**Your Small Business Roadmap for 2019 CRM Success**

*By John Oechsle, President and CEO of* [*Swiftpage*](http://www.act.com)

Your patrons have shared their data all last year through clicks, subscriptions, customer service requests, sales inquiries and more — and now [expect](https://www.walkerinfo.com/Portals/0/Documents/Knowledge%20Center/Featured%20Reports/WALKER-Customers2020.pdf) your business to be able to turn those interactions and touch points into a more targeted, holistic experience.

Small- to mid-sized businesses that cater to the right customers — and to enhancing the customer experience — can expect to see big gains. With CRM revenues at [39.5 billion dollars](https://www.channelpro.co.uk/news/10808/gartner-crm-is-the-largest-and-fastest-growing-saas) and growing, leaders are investing in this software to improve customer interactions that lead to sales.

From improved customer experiences to increased productivity, CRMs are on the rise for a reason and have become powerful and customizable enough to adapt to the needs of SMBs across industries. With that said, let’s take a closer look at what small businesses need to know when looking for a CRM — or evaluating their existing solution — in 2019.

**CRMs Are Big With Small Businesses**

**Popular for a reason:** The CRM landscape is evolving, with SMB-focused solutions increasingly providing greater value to small businesses than enterprise level competitors are able to offer; the social CRM sphere alone is estimated to reach [$10 billion](https://www.business2community.com/sales-management/where-is-crm-headed-in-2019-02127915) in 2019. With real-time insights into customer information, the ever-evolving CRM model will [drive relevant content](https://contentmarketinginstitute.com/2012/06/leverage-crm-in-content-marketing/) to better fulfill customer expectations.

**Easy does it:** The right CRM can work magic, serving as a single platform that can span across the entire breadth of an organization — sharing information and providing value for customer service, sales, product development, management, operations and more. The sales-cycle will no longer be filled with fragmented or piecemeal information conducted offline on notepads and whiteboards.

**Time to Act With Analytics**

**Playing nice with predictive analytics:** Businesses need to craft effective ads, select which customers to cross-sell to and address their customer churn. Since you have access to intelligent information, the question becomes — how will you aggregate and leverage all this data? Today’s best SMB-focused CRMs capture metrics more effectively than ever before. You’ll receive digestible and actionable information in one space.

**Getting real with artificial intelligence:** CRM and AI are quite a dynamic duo. When combined, they can bolster the revenue of your business with a predicted [$394 US billion dollars gained by 2021](https://www.statista.com/statistics/738060/us-increased-revenue-from-ai-in-customer-management-activities/), according to Statista. When paired with a good SMB CRM, AI technology can act as a virtual detective that collects clues to build customer personas, improve your ability to personalize interactions and put the right information in front of your team (and your customers) to help create meaningful interactions.

**Machines that dance to your algorithms:** Once an external function of CRM, [machine learning](https://www.cio.com/article/3311556/customer-relationship-management/5-crm-trends-for-2018.html) is now integrated into advanced CRM solutions for SMBs. And as the demand for customer intelligence increases, you can take the next best step to make a sale based on your history in the sales cycle. These systems recommend communications based on your customer preferences. The best SMB CRMs are designed to make sales and marketing recommendations that help you close deals faster and cater to your customers’ specific needs.

**Experience is the New Journey**

**Mapping your customer’s path:** If you want to improve the customer experience, listen to your patrons. Trust that your target market is willing to pay more for a quality 1:1 experience. Old data models relied on placing people into broad groups, casting customers as two-dimensional characters based on gender or profession. The best SMB CRMs go well beyond raw data to construct a realistic snapshot of each customer based on new intel they themselves provide: clicks, online accounts and conversations. From awareness to post-purchase, analyzing the ups and downs of your strategy will show when to apply the gas (or brakes) with a customer and focus on retention.

**Grow through retention:** As a small business, you want to move seamlessly from conversion to [retention](https://www.entrepreneur.com/article/284650). Make sure your CRM taps into behavioral insights and personally re-engages lost customers. CRM automation can free up your time, allowing you to focus on building core customer relationships without having to manually track down interactions. Tech-driven CRM systems will communicate across channels to rapidly seek information in order to understand each unique situation.

**Automate your marketing process:** Natively integrated marketing automation technology in an SMB CRM solution can help a business improve sales in a hurry. Once you’re able to see which pieces of marketing content lead to customer engagement, how the customer engages, how long and what their next steps are — you’ll wonder how you managed before automating. Marketing automation technology designed specifically for SMBs has gone a long way toward leveling the playing field between small and enterprise level competitors across a variety of industries and market verticals.

**Nurture the conversion:** Nurtured leads convert faster, and more reliably, than when a business relies on the customer to do all the work. Understanding when and how to act on a lead is critical. Since good rapport is all about good timing, the right CRM will work in tandem with your sales team to proactively guide customers toward the products and services best suited to their needs.

**Reach For Cloud-Based Solutions**

**Mobile is flexible:** Increasingly affordable, elastic and with you everywhere you go — the sky’s the limit when your CRM lives on your mobile device. [68 percent of CRM solutions](https://www.business2community.com/sales-management/where-is-crm-headed-in-2019-02127915) will be cloud-based in 2019 and the best cloud-based SMB CRM solutions will have a dedicated (and strategically designed) mobile component. Plan to adopt a CRM system you can rely on while in the field visiting customers with an app that gives you access to specific information instantly at your fingertips.

**Go for layers with a subscription model:** For SMBs, it’s often preferable to pay a small flat monthly fee instead of a more substantial upfront cost. The subscription billing model allows small businesses to effectively control, plan and manage their budgets — while also ensuring their technology is updated and they have access to customer support as the company grows and needs change.

**The Bottom Line**

In 2019, an effective CRM can provide your SMB with an opportunity to proactively anticipate customer needs and guide the customer experience while streamlining and unifying disparate areas of the business. A CRM won’t solve all your problems, but the *right* CRM can lead to marked improvements throughout the business while positively contributing to bottom line growth in a variety of ways. Get out there and find the right solution for your business’s growth in 2019!

*H. John Oechsle joined Swiftpage (*[*www.act.com*](http://www.act.com)*) in July 2012 and currently serves as president and chief executive officer. John came to Swiftpage with a 30 year track record of building highly profitable and sustainable revenue growth for emerging companies and established global leaders. John is an advocate for technology and education in Colorado and has been an active contributor to the Colorado Technology Association (CTA). John has received numerous recognitions, including the Technology Executive of the Year in 2006, the Titan of Technology in 2009, the Bob Newman Lifetime Achievement Award for Outstanding Contribution to the Community by the CTA in 2011 and the Nancy J. Sauer Philanthropy award in 2016. In 2015, John was appointed to the Business Experiential Learning Commission (BEL) by the Governor of Colorado and continues to serve on that commission today. In 2018, John joined the Rutgers CX Advisory Board for the Customer Experience Certificate Program at Rutgers.*