



How to discover new revenue opportunities in your CRM by revealing hidden customer insights

Magical things happen when you have a revelation: you become open to new opportunities that were always there, just hidden.

Consider an interior designer revealing a renovation to a room that completely changes its function and appearance; the room always had that potential, but it took the designer to unlock it.

Or when an ultrasound technician reveals whether the baby inside a mother's womb is a girl or a boy; the fetus has always been that gender, but it required the ultrasound to expose it.

Now how about a business tool that reveals a whole network of previously unknown contacts that open up incredible opportunities to grow revenue; those warm leads were always there, but nobody knew about them until the tool assimilated the data and revealed them.

And a tool that can alert you when a customer may be at risk of churn; not only does it warn you that your recent history with them indicates they might start looking for greener pastures, but it also provides recommendations for things you can do to help guide them back into the fold.

This is what happens when you have a CRM that is packed with complete and accurate data about all your customer connections across your entire organization, then apply a Revenue Acceleration platform to analyze this amassed data and extrapolate insights that you never knew had always been lurking there.

The reason you have a CRM in the first place

You don't implement a costly and complicated CRM to simply hold customer data. You do it so that you can do things with that data like expose opportunities, nourish stale relationships, accelerate sales cycles, and the like—things that will grow revenue, relationships, and retention.



You're driving revenue for your organization, so you want to keep a pulse on your collective network. Moreover, you want to access comprehensive client intelligence so you can quickly identify opportunities, maximize productivity, and delight customers.

That is why you have a CRM.

It sounds good on paper, but in practice it's a whole lot more complicated.

Dashed hopes and shattered dreams

Once implemented, most organizations quickly discover a fatal flaw in their CRM dreams. Things fall apart before they manage to master even the basic task of getting the system to hold customer data.

Low adoption rates. Sporadic data input. Unintentional user error. Rapid data decay. These things all lead to an unreliable customer database. The promise of a single source of truth turned to dust.

Fortunately, all is certainly not lost. There are ways to overcome the obstacle of missing and inaccurate data: automate and cleanse. Automate away all that mundane data entry to get accurate, real-time customer information into the system while saving untold hours of manual input and countless tears of frustration. Then Cleanse the system to fight data decay and keep that information pristine and up-to-date.

After automation and cleansing you finally have customer data you can bank on.

But then what?

You've got good, clean data. Great. How do you make sense of it?

Ideally, you want your CRM to help you understand your network and the context surrounding your relationships so you can better serve your customers and prospects. Easier said than done.



Typically, organizations employ a variety of imperfect methods in an effort to tease actionable intelligence from their customer data. None of it works particularly well. Often they'll just ignore the data in the CRM and do things the hard way, just because they aren't equipped to capitalize on their data's potential.

Does any of this sound familiar to you?

Making call after call to colleagues trying to find someone who knows anyone at company XYZ who can give them a warm introduction.

Scouring LinkedIn for hours on end trying to connect the dots between connections but failing because those connections don't necessarily represent a true relationship.

Creating complex relationship graphs manually, only having to remake them over and over because of how quickly data changes.

Performing time-consuming research using multiple point solutions, Google searches, company websites, social media, etc.

Employing expensive business development teams, researchers, or executive assistants to glean client intelligence by poring through endless fields of CRM data.

Investing hours, days, months, even years nurturing a relationship only to have that customer drop you in favor of a competitor...and you never even saw it coming.

This is not the way to work. Rest assured that a well-maintained CRM is a goldmine of insight and information, just waiting to be revealed.

The best part is, accessing these hidden insights is not as hard as you might think.

The secret sauce in this recipe is artificial intelligence (AI).

Consider website analytics



Think about it this way: you wouldn't dream of doing anything to your website without first teasing out every scrap of insight you can possibly draw from your analytics, would you? What pages are people visiting? How long are they spending on them? Where do they go next? Where are they coming from? What do they want?

Analytic tools exist because there is proven value to gaining all these insights from site visitor data. Why wouldn't you want to pull similarly valuable insights from your customer data?

Sure, customer data is a lot more complicated to gather and analyze, but that's where AI comes into play. Equally complex algorithms based on machine learning makes sense of what's inside your CRM and present on the proverbial silver platter insights and observations that can propel your business into the stratosphere.

Common struggles, common motivations

It doesn't matter what industry we're in, we all want the same thing: to do better and increase revenue. That's why we all use a CRM.

But depending upon what your role is, you may have different reasons for wanting to get more from your CRM.

If you're on the frontlines of CRM use, you've got specific things you want to get from the data. You might be in sales, marketing, or some other department, but you interact with your CRM on a daily basis and you're motivated to get the most from it.

It all revolves around doing your job well.

You have a quota—sales figures or MQLs or something else—that you're expected to reach. And you don't just want to reach it, you want to blow it out of the water. To do that, you need to build productive relationships with your customers.

The best way to forge those kinds of relationships is to deliver a high-touch customer experience. And along every step of the way, across each and every touchpoint, you need to appear smart, professional, well-informed, and well-prepared.

You expect your CRM to help with this. The trouble is, for every motivation you have for using the CRM, you experience just as many struggles that prevent you from getting what you want.

A lot of these struggles stem from how busy you are.

You're too busy for this stuff

You have a lot of accounts to manage and things are changing so quickly that it's impossible to keep up. If only there was a way to track your champions when they switch jobs or companies? (Spoiler alert: there is!)

It doesn't help that it takes a lot of time to source client intelligence, so it feels inevitable that you're going to fall behind. If only you could quickly and easily gain context and learn details about people and companies so you could forge those relationships. (You can!)

As well, you know that prospecting new business would be a whole lot easier if you had some warm introductions into new accounts, but it seems so hard to identify who-knows-who to open those doors for you. (Actually, it's not!)

A solution for the CRM user: Reveal

A Revenue Acceleration platform can solve all your issues. Not only does it automate the data input and cleanse it continuously to ensure every detail is accurate, relevant, and up-to-date, but its AI can dive into the amassed data of your entire company's customer records to extrapolate all the insights you need to succeed and excel.

You can easily track your champions so you know exactly where they are, what they're doing, and when it's the optimal time for you to reach out and provide them a service they need.

At the same time, you can see a score for each of your contacts indicating the strength of your relationship alongside every bit of information about them, their company, and their business you need to know in order to provide them the best possible service.

And when you need to go prospecting, a Revenue Acceleration platform provides you with relationship scores for everybody you know, so you can see at a glance who among your colleagues and contacts has the best chance of providing you the warmest lead possible.

Best of all, you don't have to do a thing to make it happen. It's all there in your CRM without you even having to remember another login or password.



Benefits for the CRM user: Reveal

The benefits of revealing these kinds of insights are clear. You'll sell more, and you'll do it way faster. Plus, you'll look a lot better doing it as you know exactly when to book a meeting to accelerate your sales, and you'll show up to those meetings impressively well-prepared.

But the benefits go beyond just increasing your sales. The Revenue Acceleration platform can also help you keep the business you worked so hard to win in the first place.

Boost retention by seeing when an account might be in jeopardy. The AI tools can look for common indicators that a customer might be considering other options, giving you a head start on nipping it in the bud through healthy relationship management.

Reduce churn; increase revenue. Win.

Get the ROI you expect

CRM users aren't alone in their desire to get more from their CRM. If you were involved in choosing the CRM—or inherited the choice—or you're responsible for managing the people who use it day to day, you need to get ROI on the investment.

Your people need to achieve their revenue goals, and you want to empower them to make that happen.

You want to mitigate risk and seize revenue opportunities. Prime opportunities happen when people retire, or are promoted, or leave, or aren't satisfied with their current solutions. If you could somehow be informed the moment this happens, you could capitalize upon these chances to grow your business.

It all comes down to relationships. You know that relationships are what drive revenue, so you want to help your team foster better ones.

Intuitively you believe that your CRM is the key to unlocking all of these things, and guess what? You're absolutely right.

The problem is, your CRM isn't giving you the insights you want.

Show me the insights!

There's a lack of visibility into who knows who across the organization. You could probably brute-force the information you want out of the CRM if you threw enough resources at it, but who has that kind of manpower to toss at something you've already invested considerable time, effort, and money into getting it this far?

Plus, in today's day and age your sales team is probably all working remotely, maybe even distributed globally. Coordinating that kind of team and helping them share knowledge is several full time jobs in itself. You're just one person, how can you possibly keep up?

Don't feel discouraged. These are very common CRM issues that people all over the place struggle with every single day.

And we're here to tell you that the solution to your data blues is closer than you think.

A solution for the CRM buyer: Reveal

As the manager, it's on your shoulders to ensure that your CRM provides value to your team. They're relying on you to help them succeed. But don't worry, you're not in this alone. With a Revenue Acceleration platform to help reveal the insights your people need to do their jobs and meet their targets, you'll end up looking like a miracle worker.

With the power of artificial intelligence on your side, you can turn your customer data into concrete direction for increasing sales and boosting retention.

[Callout block] Benefits for the CRM buyer: Reveal

You'll always know who knows who—and how well they know them.

You'll always have a complete 360° view of your contacts and their companies, and your CRM will proactively provide you with everything you need to know to make the most out of every customer touchpoint.

Understand your audiences better than ever before. Target your marketing campaigns smarter and more efficiently.



Track your champions from role to role, company to company.

Get accurate metrics so you can trust the reports you run and plan effectively.

Discover opportunities you didn't even know existed.

Reveal is where the true force multiplier of Revenue Acceleration happens.

Revenue acceleration is within reach

What exactly is Revenue Acceleration? It's the stage in a business when every part of your sales operations team—every department, every colleague, every process—works together in a strategic and synchronized way to achieve maximum results.

The Revenue Acceleration journey has four steps. In this guide we've outlined **reveal**. It's where you create organization-wide alignment around the actions taking place across contacts, opportunities, and accounts that are leading to success. You map and measure relationships to shed light on the opportunities that are likely to cross the line, as well as those that are going to take extra effort.

Reveal is the third step along the path, and in order to achieve the growth in revenue, relationships, and retention that Revenue Acceleration provides, you'll need to prime your database with clean, reliable data through automation and cleansing before you can reveal the insights that make the difference.

Automate

Free your team from mundane tasks. From time savings on mundane data entry to boosting the speed at which you can make high-quality decisions, Revenue Acceleration is a force multiplier for your organization.

Cleanse

Maintain the integrity of your data in real-time to ensure the solid foundation upon which all other aspects of Revenue Acceleration rely.

But if you stop after getting the benefits of reveal, you're not getting the full benefits of Revenue Acceleration. Complete your journey by taking the fourth step, guide.

Guide

Unearth what makes top performers perform well and equip everyone with the insights required to operate at their optimum level. Implement team-wide AI-guided selling that improves performance across the board by delivering insights into the best actions to take next, when and where they're needed the most.