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## **OBJECTIVE OF THIS ARTICLE**

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- Define Operational CRM
- Define SFA
- Discuss the benefits of STA

Operational CRMs are customer-facing applications that integrate departments that deal directly with customers with other departments in the organization, this may also include touchpoints.

This at times covers the Sales Department, Marketing Department and the customer services. Operational CRM has much to do with transactions that are meant to gather the information that is needed in order to achieve specific tasks in organizations, most especially customer-centric Enterprises.

Some of the examples include Sale Force Automation (SFA), Telesales, Call Centre Management among others. Operational CRM provides supports for staffs that deal directly [with customer in a CCE.](#)



Under operational CRM, interaction with the customers can take various forms such as personal contact, post, fax, telephone and the internet. All of these are referred to as Touchpoints. All these are relevant when promoting sales to customers.

A communication or customer service centre can serve as a medium for communicating with the customer. Through its customers' issues can be resolved.

It can also be used as a medium for introducing new products to customers.

The operational GRM integrate the various channels through which customer interacts with the organization.

The various department in the organization also uses it as a medium for interacting with one another

Operational CRM applications are used by the department that relates directly to customers but these are linked up with the back office, that is, those that do not relate directly with customers.

Through it also, the sales department can have access to update information about customers which they can use in meeting customers at the right place with the right products.

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## **SALESFORCE AUTOMATION**

Salesforce Automation is one of the applications used in CRM to increase the sales prospect of an organization. SFA automates information.

They allow for the design of the sales team based on defined criteria.

One of the capabilities of SFA is calendar management. This can be used to manage important events and appointments and other dates that are important in the life of an organization.

We also have sales reporting and forecasting which is also a very important tool in SFA. It helps sales executives to predict the market before setting out.

They will be able to identify people that will really need what they have for sales. They will also be able to identify the needs of the markets. This will help them to close in faster on deals.

We also have a lead distribution which distributes contacts and details of prospective customers to the sales representative so that they can follow up on it.

The application automatically distributes leads to sales staff to work on. The SFA is also capable of tracking customers' and prospects' contacts. Some SFA also provides internal and competitive product information

They allowed customers to have access to their price catalogue and provide valuable information about the competitors. Sometimes they provide information about customer-centric events.

The SFA provides software that enables sales departments to come up with better ideas and perform better.

## **Benefits of SFA**

### **#1 Increase the Efficiency of the sales force**

The SFA allows organizations to perform effectively by ensuring that the sales team of the organization are able to perform better.

Once they have reliable data about their prospects and customers, they will know what particular customers want and meet them at the right place with the right product and services.

### **#2 Timely Sharing of Data**

SFA allows the organisation to share reliable data with their customers.

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Once the SFA is online 24 hours in a day and seven days in a week, it will allow customers and prospects to have access to reliable and up-to-date information that they need in order to make their decision.

### **#3 Shortened Sales Cycles**

SFA also allows salespeople to have a faster closure of deals. Much of the necessities that too with going to the market with the wrong products and services are eliminated once the organization is able to find out through market research, what customers want.

This helps in hastening up the sales cycle.

This is another important feature of SFA. It allows the organization to send their reports to the back office in the organisation which allows them to link up and come up with strategies and programs which will allow the organisation to meet the customer at the right place with the right products.

### **#5 Access to useful customer Information**

SFA allows various departments in the organisation to have access to a uniform database that has customer information.

A situation where the back office does not have access to customers' information; it will not help policymakers in the organisation to put customers into consideration when they are making decisions.

The main reason for implementing SFA is to provide the sales force with ways to leverage technology to achieve operational efficiency.

SFA will also allow the organisation to have up-to-date information about their sales activities and most importantly their customer information.

## SUMMARY

Form this chapter, we have been able to discover that:

- Operational CRM are applications that are used by departments that have a direct relationship with the customers to manage the relationship with them
- We can divide service automation into three which include: Agent-based services, self-service and field service.
- Salesforce Automation is the collection and distribution of sales information.
- Benefits of STA include: Increased efficiency of the sales force, timely sharing of data, shortened sales cycle, field reporting and access to useful customer information.

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## Brainstorming Session

1. What is Operational CRM? Why is it relevant to a CCE?
2. Discuss SFA.
3. What is the benefit of SFA?
4. Why do you think an organisation need to automate SFA?

## Action Point

**PS:** If you would like to have an online course on any of the courses that you found on this blog, I will be glad to do that on an individual and corporate level, I will be very glad to do that because I have trained several individuals and groups and they are doing well in their various fields of endeavour. Some of

those that I have trained include the staff of Dangote Refinery, FCMB, Zenith Bank, and New Horizons Nigeria among others. Please come on Whatsapp and let's talk about your training. [You can reach me on Whatsapp HERE.](#) Please note that I will be using Microsoft Team to facilitate the training.

I know you might agree with some of the points that I have raised in this article. You might not agree with some of the issues raised. Let me know your views about the topic discussed. We will appreciate it if you can drop your comment. Thanks in anticipation.

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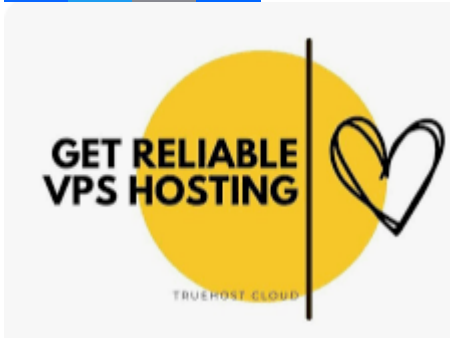
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