

The CRM Buyer's Guide for Manufacturing

Align sales, marketing, service and dealer networks
to provide the ultimate manufacturing customer
experience

Introduction

Life in the manufacturing sector has always been a challenge, but the past few years have put particular strain on companies to deliver. Supply chains have been fractured, critical skills gaps widen, and customers are more discerning than ever before. With so many moving parts in your business, the last thing you need is a complex and unwieldy sales, marketing, and service apparatus to keep your customer base thriving.

Simply creating great products is no longer sufficient in today's manufacturing environment. Today's leaders must recognize the importance of creating compelling customer experiences, building quality relationships with dealers and partners, and providing simple, time-saving functionality that offers real value to end-users. Customer relationship management (CRM) solutions can be valuable for manufacturing companies who wish to stay competitive, reduce costs, and eliminate operational complexity. It's all about shaping a dynamic yet pragmatic customer experience. That's the key driver to success in a digital, data-driven world.

It's all about shaping a dynamic yet pragmatic customer experience.

Connecting the Dots with Data

Manufacturing companies fundamentally have a broad and deep scope of activity to create, sell, deliver, and service products for their customers. When stakeholders don't even know how others in the organization interact with customers, it creates wildly inconsistent customer experiences that make companies look disconnected and unfocused.

A sales rep trying to close a big renewal but is unaware of a serious service issue, for example, may unintentionally harm the customer relationship. Similarly, marketers who don't clearly understand what supplier or service opportunities are in play may market the wrong messages or irrelevant content to a busy customer.

The key is connecting the dots — and the data. By linking disparate data sources across the business, each stakeholder gets a fresh, comprehensive view of all customer activities tailored to their role and preferences. The insights gleaned from the 360-degree view help organizations move from reactive to proactive to deliver great experiences for every customer interaction.

The 360-Degree View

Linking disparate data sources gives every stakeholder a fresh, comprehensive view tailored to their role — moving organizations from reactive to proactive.

KEY CAPABILITIES

How Teams Get the Data They Need

Sales, marketing, service, dealers, and partners all get a unique view of data they need, enabling them to:

- Surface relevant issues for each opportunity, such as historical pricing, backorders, availability, and customer interactions
- Drill down granularly on account details with contextual dashboards and reports
- Create account scoring to get a flavor of what's important at every touchpoint and what next interactions will be most impactful
- Link to external solutions such as LinkedIn to understand their networks and scour media sources to unearth news activity for an account

A unified data view drives better outcomes

When all teams share the same customer context, every interaction becomes more informed, more timely, and more valuable.

Manufacturing CRM Should Be Easy to Use, Easy to Adopt

It's unfortunate that those who stand to benefit most from a CRM system either can't or won't use it because it's overly complex and user-unfriendly.

The right manufacturing CRM makes it easy to access what you need, when you need it — they should want to use it, not be forced to use it.

THE RIGHT CRM MAKES IT EASY TO:

- Getting at-a-glance insights on the latest customer purchase or service ticket
- Communicating with channel partners
- Seeing where orders stand within the supply chain

CRM SHOULD PROVIDE:

- Drag and drop configurations that users or a local admin can customize
- Fast access to the SDK, so it's easy to stylize the system for your organization and brand
- Easy integration with ERP and MRP systems, with unlimited API calls

Demand Forecasting

In an optimally designed value chain, information must flow in both directions. While manufacturing needs to provide the right products in the right quantities for sales, it is equally important for sales to forecast and inform manufacturing operations which products need to be manufactured, in what amounts, and by when. The timing and accuracy of demand forecast data form the cornerstone for optimizing inventories, raw materials, and supply chain workflows.

"The people who have the best perspective on demand are often furthest from the supply side of the equation."

Sales-driven demand forecasting draws data from the front line and delivers it to finance and the supply chain, helping to:

- Forecast sales demand based on real numbers instead of guesswork or extensive research
- Create dealer-estimated order volumes and pipeline progress, all in real time
- Order just the right amounts of raw materials and know precisely where to focus future production
- Understand what sized bench the sales team will need to satisfy orders
- Reduce back orders and waste, speed turnaround times, and respond quickly to changes
- Improve trust that sales teams have in the CRM system accurate forecasting

SALES EMPOWERMENT

Empowering More Proactive Sales Teams

Sales teams are constantly on the go, interacting at every turn with customers and prospects to drive revenue. Modern CRM systems transform your sales team from reactive transaction agents to proactive relationship managers, enabling them to:

- Anticipate and track territory analysis and coverage, customer orders, defects and returns
- Monitor ongoing cash flow to better understand what stage a deal is in
- Ensure approval workflows such as expenses for client visits and discounts offered
- Accelerate call prep time with deeper customer information, including social media sources
- Utilize critical mobile components of sales on the go

DEALER NETWORKS

Streamlining Field Sales and Dealer Networks

Manufacturing companies often rely heavily on their dealer networks, field sales, and service teams. Teams out in the field don't want complexity, just the right amount of relationship intelligence to get the job done. CRM systems can help central ops and field groups:

- Measure dealer performance, identify gaps, align dealer planning, forecasting, and targets
- Collect and share territory data to maximize pipeline and sharpen account priorities
- Ensure dealers are current with local marketing, product trends, and promotions
- Collaborate on joint plans, growth targets, opportunities, barriers, and incentives
- Easily add new dealers to the network and see where support is needed

Teams out in the field don't want complexity —
just the right relationship intelligence to get the job done.

How Marketing and Service Impact CRM Success

You can't fully tell the whole manufacturing CRM story without marketing and service activity in context with each customer and account. As the first point of contact with customers, marketing must share everything they know with sales and service: what an account or prospect has downloaded or which website they visited, promotions, product recommendations, webinars attended, and other marketing activities. These touchpoints create a buyer persona that starts the journey and provides an initial roadmap for sales and service to follow.

Marketing Touchpoints

How a customer engages your marketing team provides important indicators for future interaction — building a buyer persona that guides sales and service.

Service Alignment

Service and support are critical touchpoints. The CRM system utilizes a business rules engine to enable seamless handoffs, smart escalations, and SLA compliance.

Sales and service run more effectively when the CRM system utilizes advanced workflow to enable seamless handoffs and smart escalations, such as routing calls to in-house product experts outside the support center. Similarly, to achieve SLA compliance, the resolution of the entire service lifecycle must be visible to multiple stakeholders. The system can send alerts whenever threshold values for action are exceeded or unmet, and high-priority issues can be dealt with on time.

CRM Optimization Drives:

Additional manufacturing processes that can be optimized include:

- **Contract Management:** Speed up time-to-close and automate contract creation
 - **Order Management:** Automate workflow in the post-sale process
 - **Service Delivery:** Automate the process around post-sale delivery and installation
 - **Claims Processing:** Manage tracking of customer claims, returns, and refunds
 - **Purchase Requests:** Enable intelligent purchase order creation and alerts
-
- Pipeline visibility to identify new opportunities
 - Improved conversion rates across all sales stages
 - New business growth by tracking new accounts
 - Retention and profit per customer
 - Granular sales performance by rep
 - SLA compliance with customer service commitments

Conclusion

In an era where even large manufacturing companies must be agile to address shifting markets, stressed supply chains, and changing customer demands, the ability to provide a connected and compelling customer experience is of paramount importance. The right CRM solution can go a long way to satisfy the needs of every key customer-facing group, from marketing and sales to service teams, dealer networks, IT, finance, and the executive team. When all stakeholders work from the same playbook and within a fundamentally easy system, creating and maintaining that experience becomes a much simpler task.



Revolutionize Your CRM and Business

Learn what SugarAI can unlock within your organization.
A better solution is just a click away.

[GET A DEMO](#)

About SugarAI

SugarAI helps sales teams reach their highest potential. Companies choose SugarAI to cut through complexity, prioritize opportunities, and increase upsell using the resources they already have. SugarAI is ideal for complex, relationship-driven industries — such as manufacturing, wholesale and distribution — looking to accelerate growth and drive smarter decision-making.