

CRM & Marketing Automation for Startups & Entrepreneurs:

Improving the Customer Journey



The Startup and Entrepreneurial Market Today

In the U.S. alone there are over 70,000 startups, all vying for a piece of the pie. In such a saturated marketplace, the stakes for these businesses are incredibly high. By all accounts, many of those startups will ultimately struggle and, more often than not, experience failure within the first five years, as they struggle to capture a consistent customer base and generate the revenue needed to survive. No matter where a startup finds themselves, providing a consistent, memorable experience for customers has been one of the most important factors in generating long-term success. And research has shown that 73% of customers say their experiences had a direct influence on the purchasing decisions they make.

As these businesses look to draw in customers, it's important for them to gain a deep understanding of what their needs are—asking questions like, what are the areas prospects and customers are most interested in? And, how do those customers like to be contacted and communicated with? Answering these questions makes achieving that level of customer experience possible.

**Customer experience
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When it comes to creating those experiences, CRM solutions are uniquely suited to help startups manage everything from sales pipelines to forecasting revenue and engaging customers. Competition among startups isn't going to lighten up anytime soon. Incorporating the right CRM solution can help these businesses ensure they are meeting the needs of their customers and forging strong relationships.

Implementing the Right Startup and Entrepreneurial CRM & Marketing Automation Software, the Right Way

Funding and profitability are incredibly important for burgeoning startups. In fact, 38% of startups end up running out of capital or investors at some point. So, for these organizations there just aren't always the resources to invest in flashy software or to build out robust marketing departments full of professionals. So, when choosing a CRM solution for your startup, affordability should be a major focus. Look for solutions that are a match for your needs, but also won't drag along a catalog of features that are irrelevant to your business.

The most impactful CRM solutions for startups are custom built to save time, boost productivity and reduce costs, all providing much needed relief to the businesses bottom line. These functions are particularly essential for startups as they get first set out because many don't have a significant sales or customer service offering, leaving it up to founders to take on the extra responsibility.

CRM Expert Corner



Debora Boyle
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Tip: The right CRM solution will evolve and scale with a startup business, keep crucial client details, offer solid relationship-building features to transform leads into clients and segment contacts into groups so you're always reaching out with the right message.

When adopting a CRM platform for your startup, look for a platform that can grow with your business and help you meet the unique needs of your target customers. The right solution offers affordability, scalability, flexibility and customizability that make it possible to master customer relationships and reach new audiences.

Optimize Your Startup and Entrepreneurial CRM

For a CRM platform to be effective within a startup, it needs to deliver both flexibility and scalability capable of matching the unpredictable and rapidly changing nature of those businesses. Some startups may accelerate their growth much more rapidly than planned, and others may go through varying periods of growth and stagnation. Regardless, an optimized CRM platform is one that meets the needs of startups no matter the situation.

It's no secret that the key to success for startups comes down to how well they can identify and draw in customers. Leveraging a CRM platform empowers startups to optimize their workflows and take advantage of previously unrealized insights into customer desires and behaviors, unlocking opportunities to attract prospects and capture their target audience's attention.

There are several ways that startups can get the most out of their CRM platform. Here we'll look at a few of those methods startups can use with CRM platforms to get a handle on target audiences, effectively build relationships and improve experiences:

Lead Generation

For startup founders already wearing multiple hats, gathering and tracking potential customers is a monumental ask. A CRM platform brings invaluable tools that offer resources like landing pages, email MA and workflows, enabling you to approach and follow up with prospects.

It also allows you to segment leads based on location, which products they're interested in and a host of other key demographic traits that may make them more likely to engage with your startup.

Segmenting these leads adds context to your targeting, ensuring you send out only relevant information to prospects. By segmenting customers into a variety of demographic groups you can then send highly personalized email campaigns through a CRM platform, boosting customer experiences by making them feel like you know what they want, thereby improving confidence.

Application Integrations

In a budding startup, data doesn't always have one definitive home; some things are scattered across spreadsheets and other documents and file types, while others may live on something as low-tech as a post-it note. A CRM solution can gather all your customer data, track interactions and provide highly accurate, real-time reporting, saving you and your team valuable time instead of searching high and low for the right information.

Getting that data fully integrated into your CRM platform brings the added benefit of integrating with apps you're already using like QuickBooks or DocuSign, ensuring information flows effectively, saving time in the process.

Salon Real Thibault: Developing a More Personalized Approach to Improve Service



For years, I recorded these details by hand, either on paper or in books, until I decided to computerize my business.



Real Thibault,
Hairdresser and Stylist

Streamlined Customer Journey

Providing an impactful customer experience is critical for startups looking to separate from the pack. And a key part of making that happen comes with ironing out the entire customer journey that a business is offering prospects. The right CRM platform makes it much easier for users to track that entire journey from the first time a prospect is contacted to the point they become repeat customers. Within a CRM platform for startups, users are also able to monitor and follow every one of those engagements across every channel including web pages and other content, as well as every human interaction that takes place, giving the business a complete picture of where every customer, and potential prospect, stands in their journey from start to finish.

Leveraging Marketing Automation for Startups and Entrepreneurs

Startups are inherently fast paced, and often only have a small number of staff on board at any given time. With those constraints, it's important that everyone be maximizing the time they spend in ways that benefit the business. And the staff that are there often aren't equipped with a significant expertise or background in marketing. With limited staff availability and resources, marketing automation (MA) helps take away some of the more time-consuming tasks and simplifies processes so you don't have to be a professional to build an effective campaign.

With that in mind, let's explore a few ways that MA can help startups build strong connections and grow their customer base:

Automated Email Marketing

Any effective marketing campaign needs to be tailored to the right audience. With highly segmented contact information in their CRM platform, startups can then take that data and create highly targeted and personalized email campaigns sending out updates and product information to those who are most likely to be interested. From there, startups can crack the code of where their customer's interests lie by sending email campaigns that request feedback on what they like and what can be improved.

Through these MA tools, startups can create response-driven nurture campaigns to gently guide prospects down a customized path. MA features like automated email marketing lets businesses set up automatically triggered emails to contact prospects when they reach a certain number of engagements, reducing the likelihood of connecting with them at inconvenient times.

Landing Pages & Forms

Landing pages and web forms are a must for any MA toolkit. Incorporating these features into a startups marketing efforts and operations can help generate a deeper level of direct feedback from customers that help tailor their message, build stronger relationships and attract repeat clients. By folding in survey forms on those landing pages and web pages, startups can nail down what a customer is most interested in and feed that information directly into the CRM platform. And with MA, you can track when your forms are being submitted in real time with automated email alerts. Getting this instant feedback can help you take action faster and resolve any issues before customers are left with a negative impression of your customer service capabilities.

Broadly, forms present a major opportunity to improve customer experience. Creating pages and forms that survey customers and present them with a way to share feedback helps optimize experiences in an impactful way.



MA Expert Corner



Kristin Gray
*Act! Marketing
Automation Expert*

Tip: Having web forms and surveys on your site to ask customers about interests and experiences can help your business gain a better understanding of desires and opportunities for growth.

Tip: Creating forms for support questions makes it easier to respond to customers quickly, address their concerns and rapidly improve experiences.

In Conclusion

For startups attempting to break through and establish themselves, differentiating from the rest of the crowd means delivering a top-flight customer experience. A customizable CRM solution, along with MA tools, can help startups get a handle on their intended customers, expand reach and create higher-quality engagements. When it's time to incorporate your marketing strategy, an [all-in-one CRM and marketing automation tool](#) can streamline implementation, making for smooth integration into other software within your tech stack.