PLOTBOX

The 7 Best CRM Features
For Cemeteries

What *is* a CRM?

In a nutshell, Customer Relationship Management (CRM) is the technologies and strategies a company will use to manage and analyze their interactions with potential customers.

Most often, when people talk about CRM, they're usually referring to a CRM *system*, a tool that assists with the management of contacts, sales, productivity and more.

CRM

abbreviation for
customer relationship management

- Dictionary.com

So, what are the best features of a CRM system for cemeteries?

Number 1:
Streamlined data management

CRM systems provide a searchable database to store contact information.

Relevant documents including deceased records, deeds and contracts associated with each contact will also be stored.

This gives you much better visibility than keeping all your leads in a little black book!

Number 2:
Sales forecasting

Implementing a CRM in your cemetery will increase your knowledge and visibility of your sales pipeline!

Easily visualize your entire sales pipeline and move prospects from one stage to another.

Say goodbye to mental maths to figure out what's closing each month - let a CRM do that for you!

Number 3:
Meaningful reports

Produce reports you need in real-time including your sales team activity and revenue growth by using a CRM.

Highlight strengths and weaknesses within your current sales processes and spend time on future planning.

Number 4:
Monitor sales team activity

Using a CRM in your cemetery can help standardize your sales team processes.

Tasks can be scheduled in a calendar, updated and completed. Progress of each task can be easily tracked.

Moreover, productivity including emails, calls, meetings, contracts sold and revenue generated are presented in a dashboard, giving a high-level view of your sales team productivity.

Number 5:
Integrations

Ideally, your chosen CRM should integrate with software you're already using in order to complete your daily tasks, for example Gmail, Google Calendar and financial systems.

By choosing a CRM which can integrate with your existing applications, you can successfully minimize the time your sales team spend switching between various windows.

Number 6:
Leaderboards

Create some friendly competition in your cemetery by displaying individual activity levels and forecasted sales in a CRM.

This will allow you to acknowledge your highest performing salespeople as well as motivate others to reach that standard.

Maybe even offer a prize for each monthly winner!

Number 7:
Mobilize sales

With a mobile CRM you'll have the ability to access information from anywhere at any time, on any device - meaning you can take advantage of the potential to work off-site while connecting to your office quickly and easily.

This gives you the opportunity to have an outside sales team efficiently sell within a family home with no need to drive back and forth to the cemetery to check data and maps.

See PlotBox in action – arrange a demo today!
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