

FROM CHAOS TO CONTROL

**HOW CRM HELPS
ADVERTISING &
MEDIA AGENCIES
SUCCEED**





ABOUT THIS EBOOK

This e-book is designed to help you determine if a customer relationship management (CRM) solution is right for your creative services agency. Insightly surveyed 365 real creative professionals working in marketing, communication, design, advertising, and media across the globe. We reveal how they use CRM with project management to solve their biggest problems.

You know your business. We want to help you find ways to run your business better.

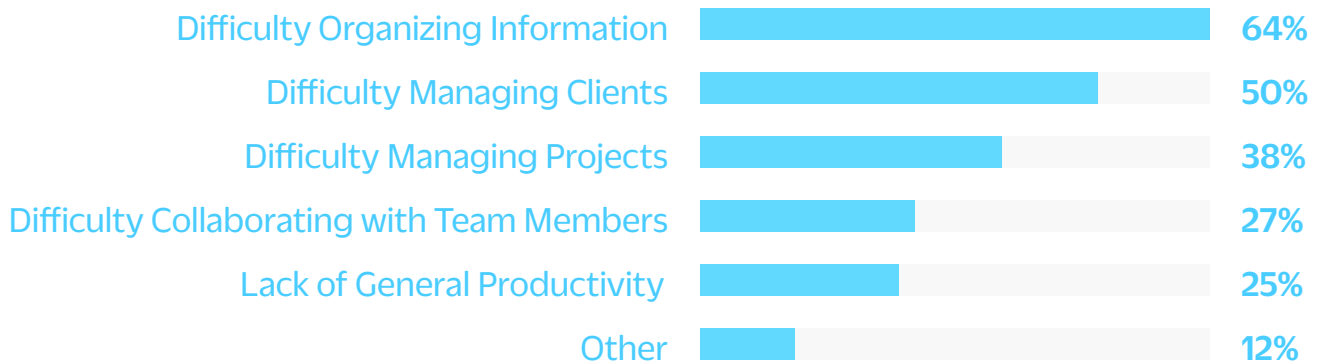
Your time is valuable and incorporating a CRM into your company can be time-consuming. However, as these results demonstrate, the pros certainly outweigh the cons. Your new CRM will help you spend less time managing—and more time creating.





LET'S TALK ABOUT YOUR PROBLEMS...

When we asked our creative professionals about the business problems they encountered most before implementing a CRM, a whopping **64%** responded that organizing information was their biggest issue. Half of all respondents reported they had difficulty managing clients. Well over a third had difficulty managing projects.



“Our sales staff was protective and isolated by using individual desktop installations of Outlook. It was impossible to assist customers in the absence of their representative. Before CRM, we were unable to identify repeat cash customers, share tasks, and contacts.”

*—Sales Manager,
Medium Enterprise Consumer Products Company*



AND FIND SOLUTIONS

After implementing CRM, our surveyed professionals expressed a number of improvements across departments...

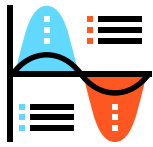
How has having a CRM solution helped you improve your overall business?



Our responders reported these improvements after implementing a CRM:

- Organized and centralized customer and sales data: all in one place, accessible any time, and from any department.
- Customer history and interactions accessible with a simple search, so each customer's issue is addressed quickly and thoroughly.
- Project management runs more smoothly as deadlines are met across all departments.
- Increased ability to collaborate with teams throughout the creative process, keeping everyone on the same page, both client-facing and internally.

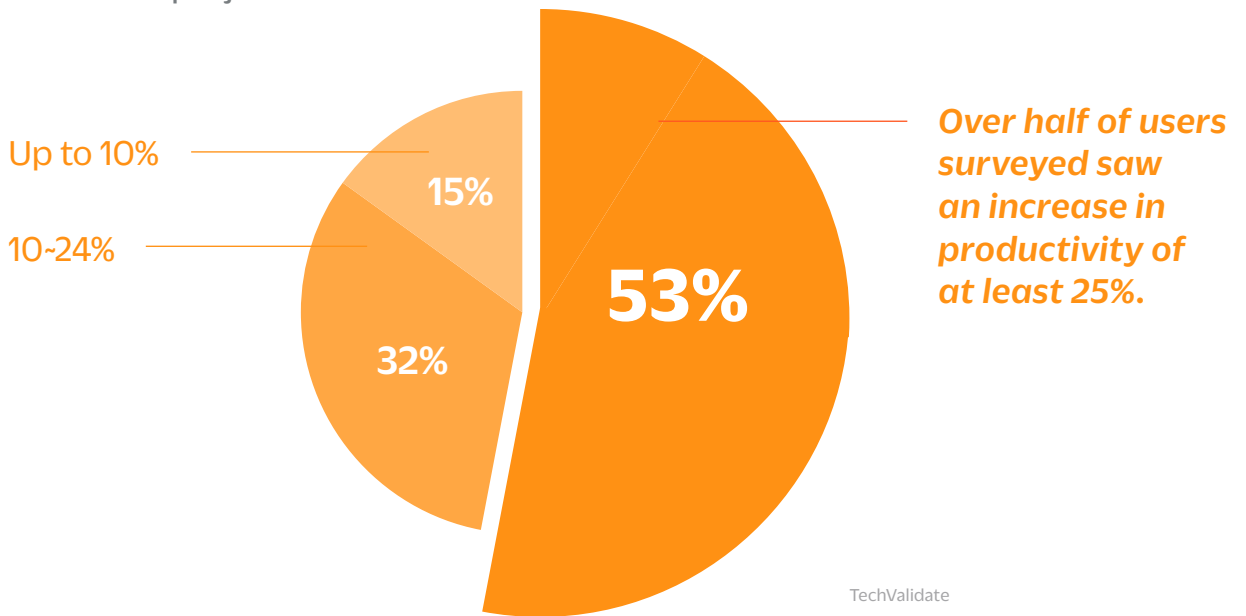
Now that's running business better.



CAN A CRM HELP MY TEAM BE MORE PRODUCTIVE?

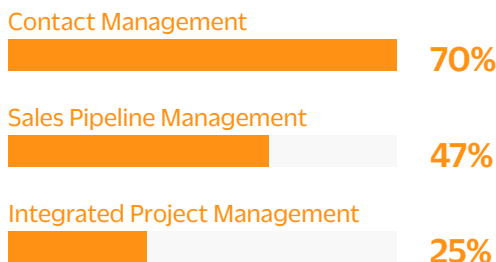
The simple answer? YES.

Over half of our creative professionals saw an increase in productivity between 10-49%. Another quarter of responders said productivity increased by over 50%, organization-wide. Now that's getting the job done. No more time wasted on menial tasks like searching through mounds of business cards or files just to manage one lead, or sending hundreds of emails to update your team on a project.



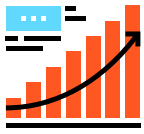
How?

The top three most helpful features were:



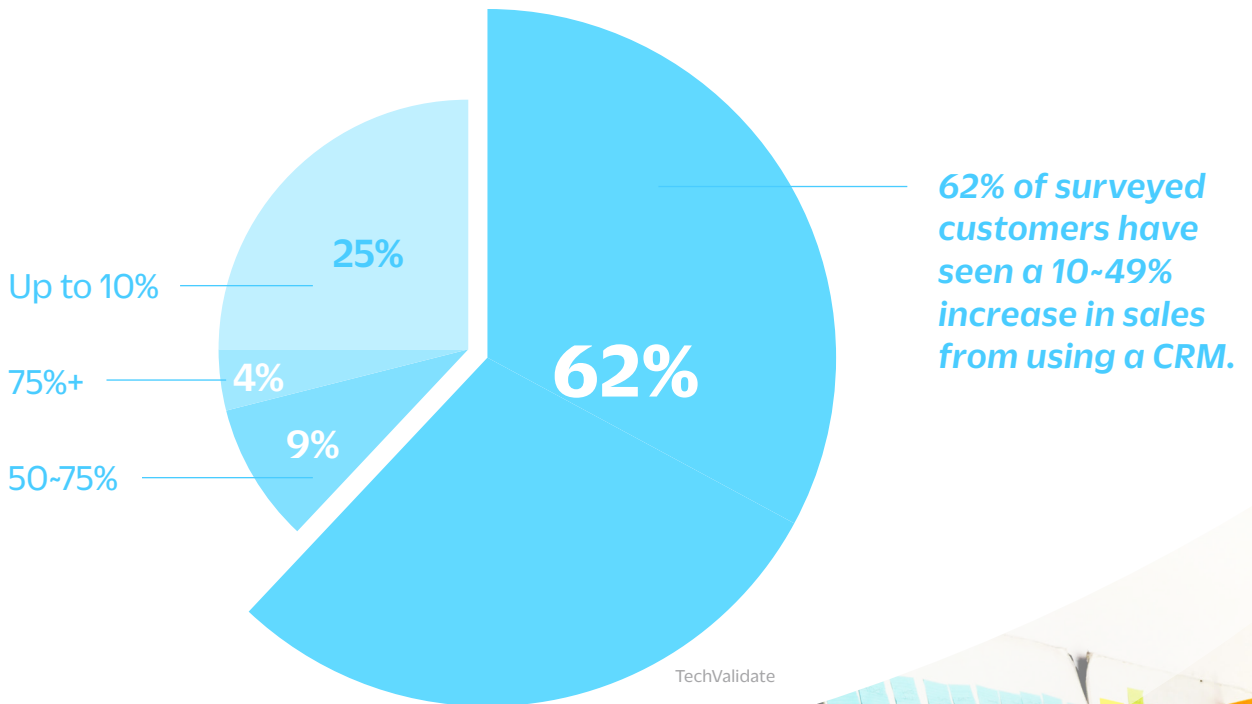
Other helpful features for increased productivity:

- 23% Mobile CRM app
- 19% Application integration (Google Apps, Office 365, and more)
- 12% File sharing
- 12% Customized reporting
- 10% Social media integration



CAN A CRM HELP GROW SALES?

Creative professionals using CRM witnessed an overall increase in sales after implementation. CRM makes it possible to manage the sales pipeline more efficiently and effectively, from opportunity to prospect to customer—ultimately leading to more sales, more upsells, and better long-term customer retention. Plus, when sales is integrated with day-to-day business, you get a better picture of the overall health of your business.



“Our CRM has allowed for better organization of leads, clients, and projects. Reports have helped us measure the impact of our approaches to new clients.”

—Leonel Peragallo, Business Development Manager, The Mint Circle

“The CRM helps the sales team track leads and convert them to clients once the deal has been closed.”

—Madelynn Graham, Director of Marketing, Cactus Sky Digital

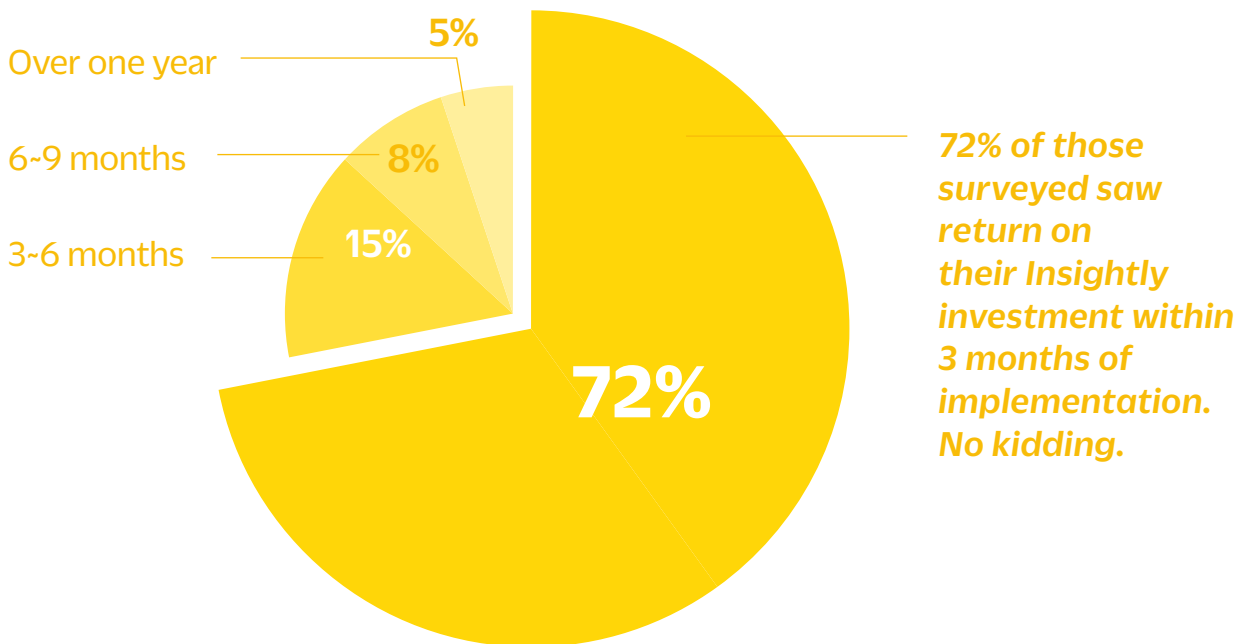




HOW LONG BEFORE WE SEE A RETURN ON OUR INVESTMENT?

58% of creative professionals surveyed said they hope to see their ROI paid back in less than one year after investing in ANY new business management tool. Another 28% said they want to see ROI immediately. While we can't vouch for ROI on just any CRM out there, 95% of our creative professionals surveyed said they realized a return on their Insightly investment in less than one year.

When did you realize a return on your investment once you began utilizing your CRM?



“CRM is the backbone of any business to manage opportunities and deliver consistent business value and results to the end customers. It also gives us the ability to track, engage, and report on opportunities to the team to have a cohesive and uniform picture of the business.”

—Marketing Professional, Small Business

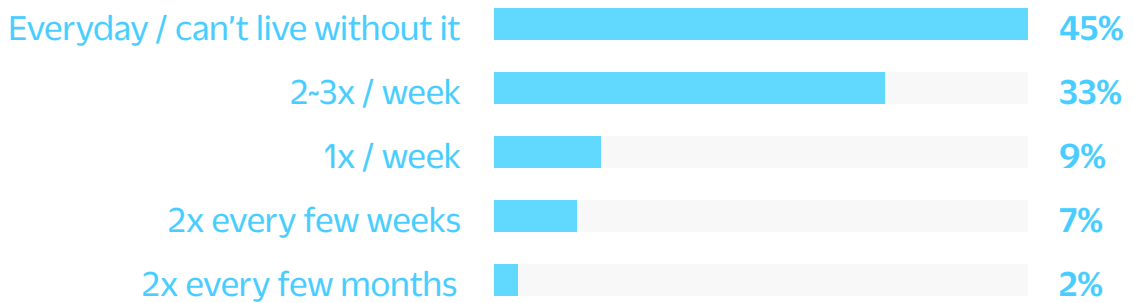




HOW OFTEN DO CREATIVE PROFESSIONALS USE INSIGHTLY CRM?

You may be thinking a CRM might just introduce extra steps into an already busy day. We get it: change is always painful. Yes, there are new applications and processes to learn. However, we’ve designed Insightly to be easy to use. We also offer extensive online help and tutorials. So if you can work through the changeover, it’ll be worth it in the long run. When all is said and done, creative pros who use Insightly use it and love it.

How often do you use your CRM?



“For the first time we have a tool that has been embraced by all teams that deal with our customer. A tool in which they truly collaborate on what is most important: getting our customers the best service.”

—Managing Partner, Small Business Media & Entertainment





CONCLUSION AND SUMMARY OF RESULTS

As our responders working in creative professions indicated, implementing a CRM is worth it. It's not just about running your business. It's about running your business better.

Q&A

How long will it take to realize a return on investment from Insightly CRM?

72% of creative professionals surveyed saw a return on their Insightly investment in just 1 to 3 months. Plus, studies show CRM generates \$8.71 in revenue for every \$1 spent (Nucleus Research).

How much can a CRM potentially increase sales?

Studies show that companies with a fully-utilized CRM system can increase sales by 29% (Forbes).

Do you have any insight into the benefits of well-executed project management?

89% of high-performing organizations value project management. Why? Project management boosts the success rate of strategic initiatives by 16% (PMI's Pulse of the Profession Survey: 2015, 2014).



ABOUT INSIGHTLY CRM

Insightly provides customer relationship management (CRM) software for small, midsize, and enterprise businesses across a range of industries such as manufacturing, consulting, health & wellness, media, and others. With more than 1.5 million users worldwide across 25,000 companies, Insightly is the world's most popular CRM software for Google Apps, Gmail, and Office 365 users. Grow your business faster than ever before by building stronger customer relationships, accelerating sales, and managing projects at every stage of the customer lifecycle.

[SIGN UP FOR A FREE TRIAL](#)

ABOUT TECHVALIDATE

TechValidate is the world's only customer content creation platform. TechValidate helps companies harness the voice of their customers for fact-based marketing.