How to automate 9 common office tasks

insightly

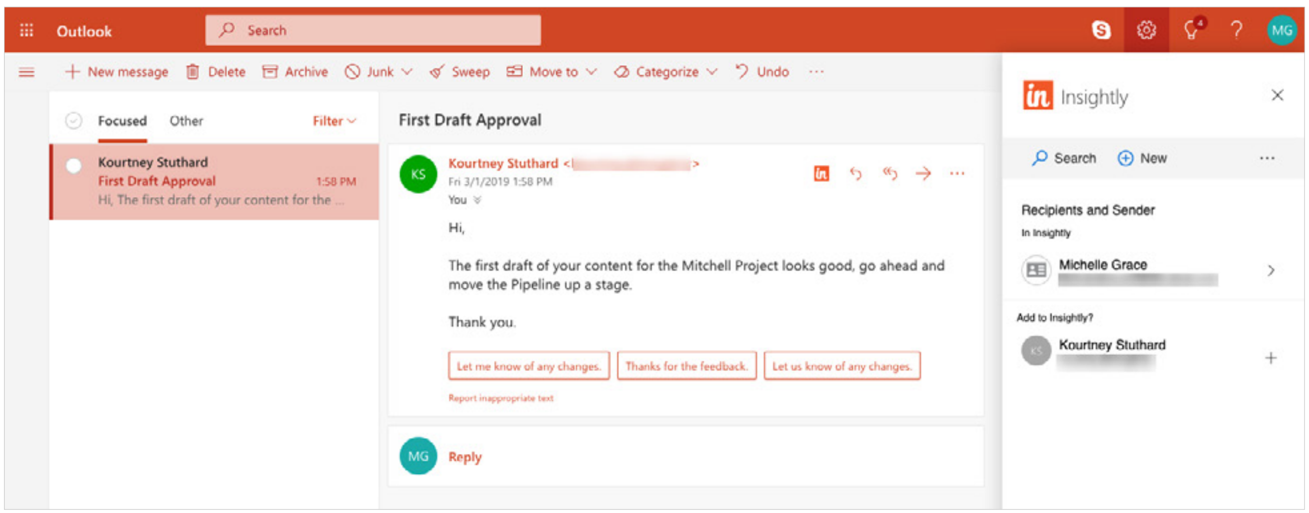
Introduction

Whether you are happy with your team's productivity and performance or think you feel ready to hit a reset button, revisiting your team's common office tasks on a regular basis is critical to preventing mishaps, maintaining efficiency, and creating a culture of high productivity and collaboration.

In this report we go over nine most common inefficiencies and ways you can use your CRM to banish them.

1. Summarizing every conversation

There's a difference between being thorough and being painstakingly scrupulous. As you dig around in your CRM's notes, you may notice that some reps spend way too much time summarizing client conversations. Although you appreciate their attention to detail, you're not looking for a novel. You want the basic, useful facts, nothing more or less.



Insightly Outlook sidebar

Tip: When dealing with team members who are overly detailed, confirm that they're properly using your CRM's email integration. For example, Insightly can serve as a repository of incoming and outgoing emails, automatically linking them to the correct records.

With all of their emails saved securely in your CRM, reps don't need to go into detail. After all, they usually send lead follow-up emails with a summary of their conversations. Why not put those emails to better use in your CRM?

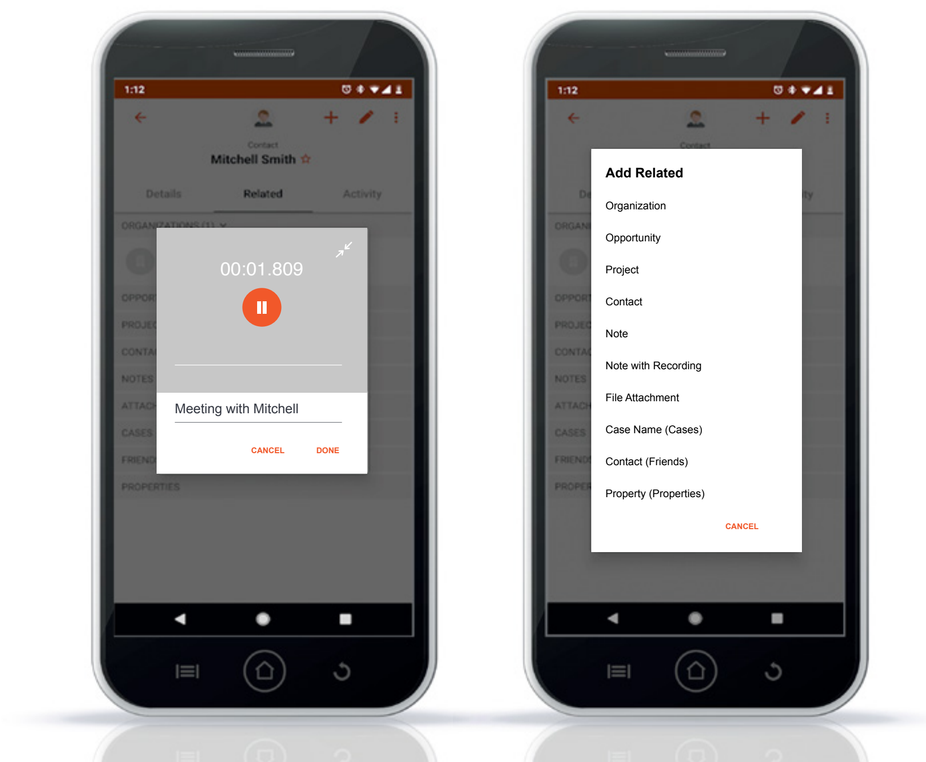
2. Frantically capturing meeting minutes

While we're on the topic of summarizing things, let's hone in on your internal meetings. If you're like most organizations, a typical meeting starts by someone saying:

"OK, let's get started. Do we have a volunteer to take notes?"

This rarely works out well. Because the notetaker feels obligated to judiciously capture everything and renders himself useless as a meeting participant. Rather than engaging in the discussion, his brainpower is reallocated to a relatively low-value activity. After the meeting ends, he must clean up his notes, format the document in a suitable way, and share it with the team.

Tip: Instead of taking notes, use a meeting recording tool. There are countless webinar platforms on the market that provide this functionality. In addition, some CRMs, such as Insightly, also offer an intuitive way to capture meetings. Insightly's mobile app lets you record meetings and add notes (with an attached audio file) to any record in Insightly.

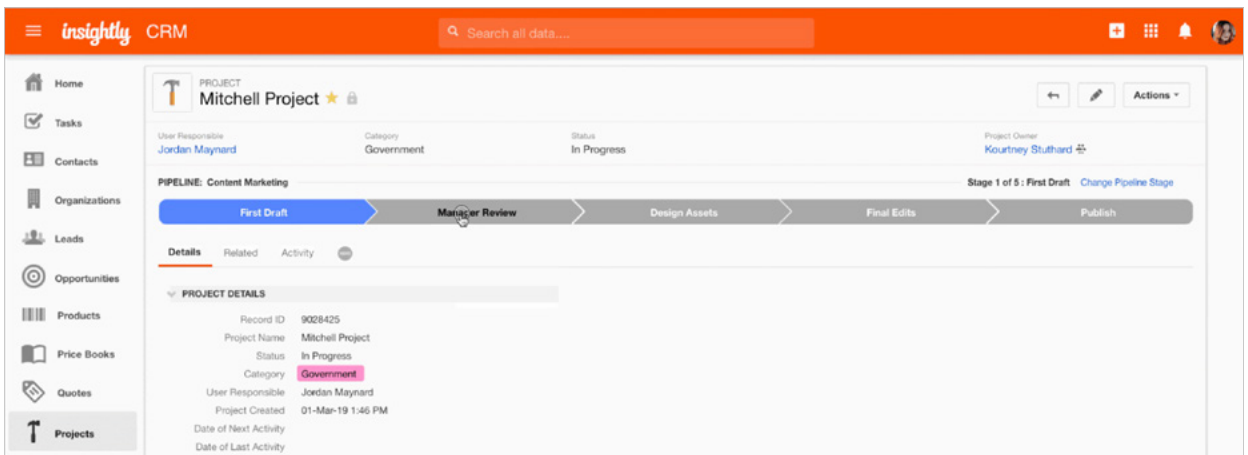


Note: If your team still sees value in a written summary document, you could use an online transcription service or send the recording to a freelancer or virtual assistant for transcription. Outsourcing this task could save you money, time, and deliver a cleaner end-product.

3. Starting new projects from scratch

While projects may vary in their scope and level of complexity, most projects share a similar workflow.

Take, for example, content marketing. Most businesses understand the importance of generating conversion-friendly website content. Unfortunately, some get bogged down with the production-related tasks, thereby slowing the realization of their marketing goals. Has the article been approved by all the stakeholders? Are design assets ready? When should we publish the article?



Project pipeline management

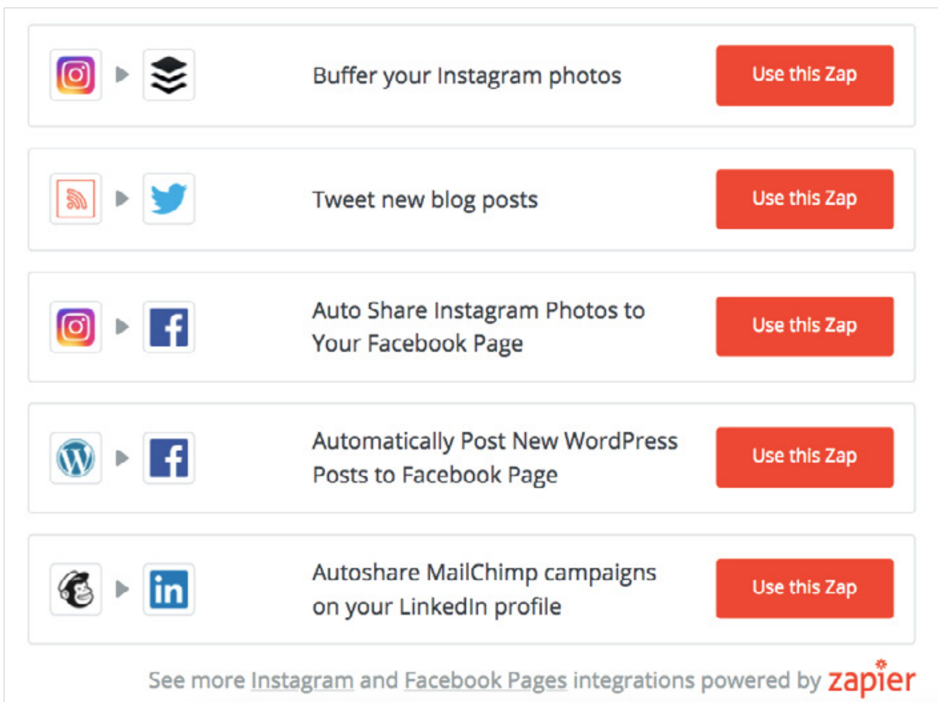
Tip: Content production is the perfect use case for project templates. Like your sales team, which always follows a predictable process (New Interested Quoting Won, etc.), marketing could also benefit from a predefined workflow. As a work product advances in the pipeline, tasks can automatically fire via activity sets. Now, your team always knows exactly what needs to happen next.

Can you think of other projects that follow a predictable pattern and might benefit from such an approach? Check out Insightly's CRM's project pipeline.

4. Manually sharing new content on social media

Speaking of content marketing, after an article goes live, who at your organization is responsible for sharing it? Even if a task is being assigned to someone, how much time passes before new content is visible on social media? If the answer is more than a few minutes, you're probably missing out.

In today's world of RSS feeds and APIs, there's no reason to continue waiting on your social media manager.



Zapier integrations

Tip: Check your CRM for integrations, so you can automate content sharing on social media. Or, if you are in the process of selecting a CRM, make sure it comes with key integrations for content sharing.

Insightly, for example, integrates with Zapier platform, which connects Insightly CRM with hundreds of apps, including Twitter, Facebook, and LinkedIn. By building social media "Zaps," you can get your content in front of your followers faster and with a regular cadence.

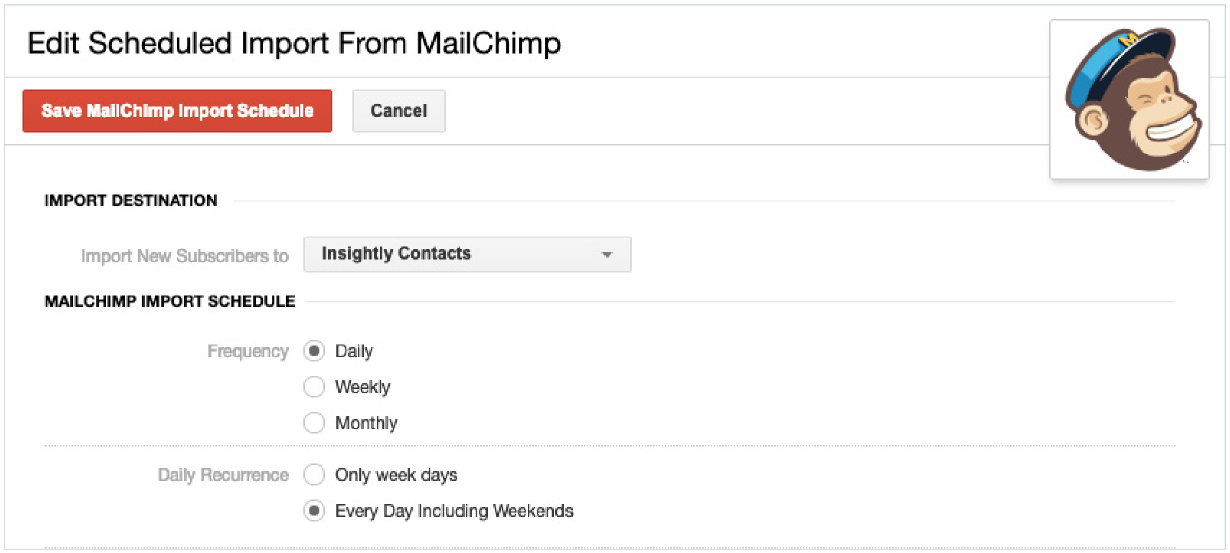
5. Checking multiple systems for the "whole story"

Customers interact with your business in a variety of ways: some send emails, while others pick up the phone and call your 1-800 number. Still others are quick to file support tickets for issues large and small.

If you're not careful, this situation can easily lead to data silos in your business and overwhelmed customer support teams. Data silos and tired employees lead to inefficiency and poor customer service.

Tip: Although you can't force customers to use a single line of communication, you can (and should) take steps to consolidate customer interactions into a single system. Granted, there's not one software application that can fulfill your every need: your CRM will never replace your support ticketing software and your newsletter software will never replace your CRM. However, what you can do is harness your CRM provider's out-of-the-box integrations.

Pushing events, such as newsletter clicks or support requests, and tracking results in your CRM should make it much easier to understand each customer's journey and, ultimately, deliver better service.



Insightly integrations

6. Coordinating calendars

How much time do you waste on trying to coordinate calendars? Your company isn't the first to suffer from this predicament. Luckily, there are a few simple ways to overcome both internal and customer scheduling headaches.

"I'm interested, but let's coordinate via email to regroup next week." For your sales team, hearing these words can be aggravating. Why not give reps the ability to share their calendars with leads? Tools like the YouCanBook.me app will allow your sales team to schedule demos faster and with much less effort.

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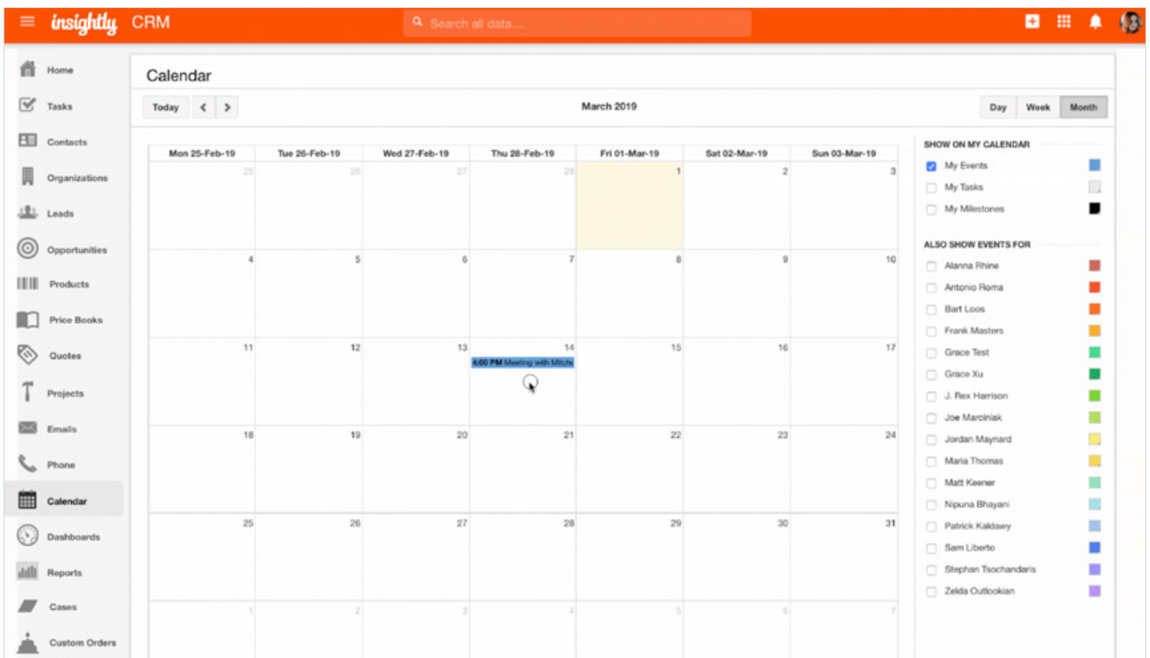


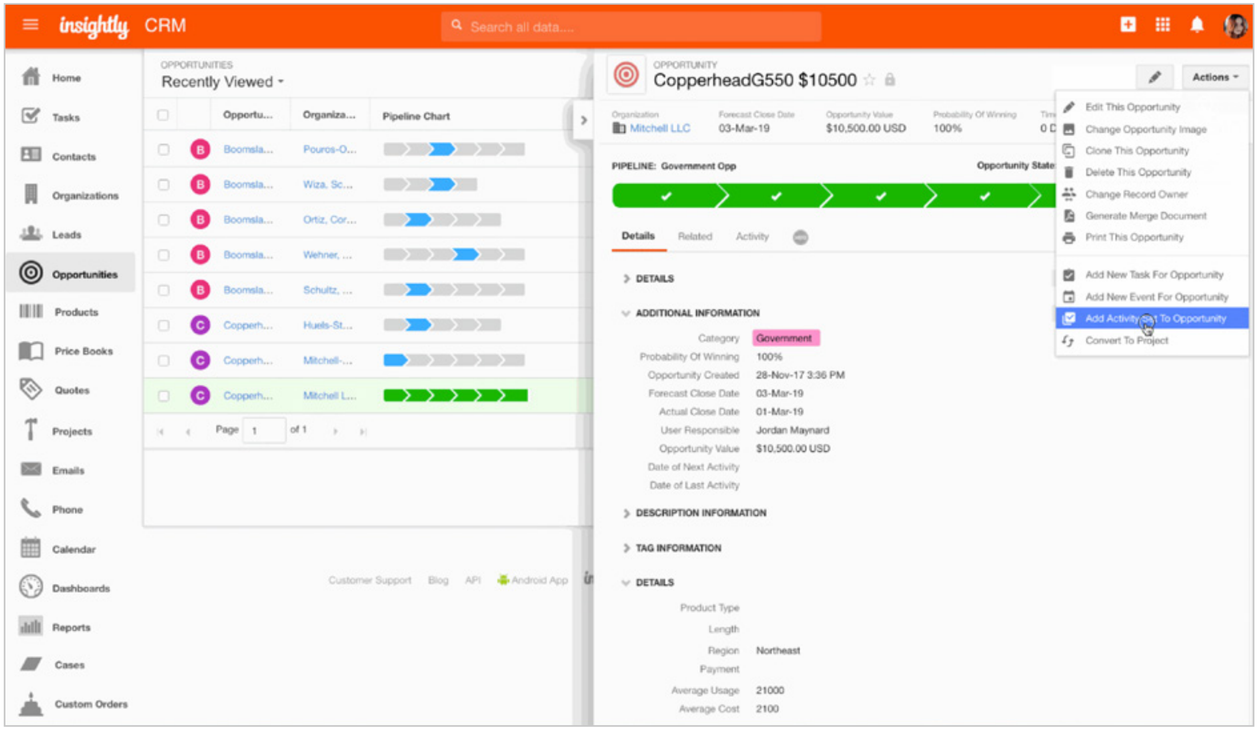
Insightly calendar management

Tip: Use an internal central calendar to manage your team's upcoming trade shows, conferences, and webinars, to avoid cluttering your personal calendar. Check to see if your CRM offers a team coordination feature, such as Insightly's event calendar.

7. Keying CRM data into your "project system"

There are countless project management systems on the market today. But as enticing as a "project-focused" system might seem, there's also something to be said for keeping all your data and processes under one roof.

Tip: Maximize the use of your CRM, instead of deploying "another system," to significantly reduce manual data entry and boost customer satisfaction.



Opportunity to project conversion

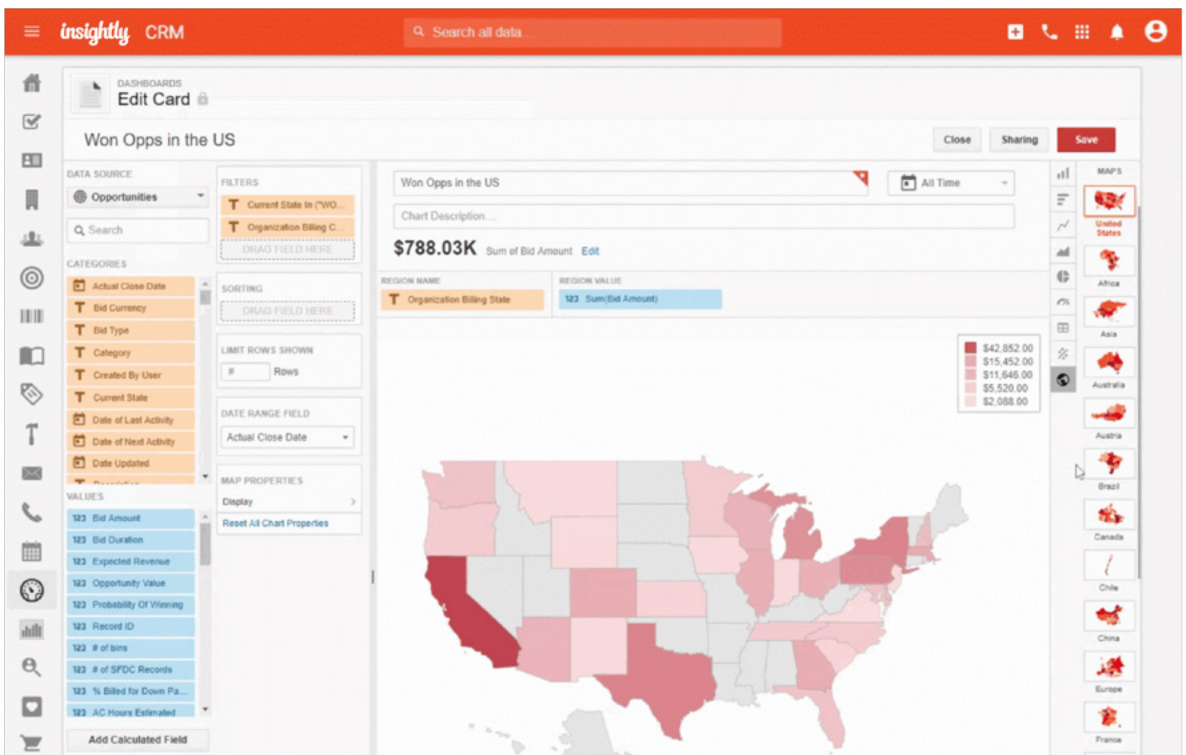
Take, for example, a software company that uses Insightly to track new leads and opportunities. If the company uses a third-party project system to track customer onboarding, someone (or something, such as an API) must send data back and forth between the two systems. But, if the company had simply converted the closed opportunity into a new project right there in Insightly, the onboarding team would bypass the data entry. In addition, with the originating opportunity's records preserved, everyone has a 360-degree view of each customer's story.

8. Pulling sales reports

Tired of asking for the same reports every month? Your company has aggressive growth plans, which means you likely rely on dozens of key performance indicators (KPIs). Projected sales, actual revenue, and pipeline value are just a few examples. There's no doubt that the data is sitting somewhere in your CRM. Sadly, your team sometimes drops the ball and fails to feed you the information you need, when you need it. You've tried assigning recurring tasks, but you can't force people to do their jobs.

Tip: It's time to put your reporting on autopilot and free up your team to focus on pressing matters or more creative work. Check to see if your CRM offers scheduled reports and/or alerting.

With Insightly CRM, you can use dashboard table cards to create smart reports and access all relevant data in one view, create and share custom reports in various formats with different stakeholders. You can also chart your data on more than 40 high definition geographic maps, covering every region of the world.



Sales territory mapping

9. Gathering social profiles

In today's interconnected world, it makes perfect sense to check a new lead's social media profiles before reaching out. Is the prospect a good fit for your services or products? Would an email, phone call, or direct message be the most appropriate way to follow up? Checking social media can help answer these questions, thereby increasing the chance of engagement.

However, if your company receives hundreds (or thousands) of leads per year, manually gathering social media profiles is not feasible.

Tip: Use your CRM's social media plugins to automatically research and build customer profiles based on social data.

Automation, not elimination

One final note – as you begin automating certain tasks, you may receive pushback from your team. Change can be hard, especially when daily routines are interrupted. Be sure to over-communicate that you're not eliminating their jobs. Rather, you're simply refining the company's work to be even more value-focused.

It's truly a win-win!

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Which back office inefficiences are hindering your business growth? Schedule a call with an Insightly rep for a quick assessment of your CRM needs and get a free, personalized demo of Insightly features.

Call us at 1-800-999-4039 or email sales@insightly.com.

About Insightly

Insightly provides customer relationship management (CRM) software for small, mid-size, and enterprise businesses across a range of industries such as manufacturing, consulting, health and 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.

Over 1.5 million users

180 countries worldwide

67% made back their investment in 3 months
(source: TechValidate)