Study:

Manufacturing companies show big ROI from CRM

Survey shows average
18% increase in revenue

insightly

Introduction

No matter the product type, all manufacturing companies share a common set of operational needs that have to be met for them to reach their business goals, stay competitive, and build long-lasting customer relationships.

Manufacturers must coordinate and align their teams and processes at every step, share data, and maintain an effective feedback loop for everything from planning and forecasting to managing production, inventory, sales, distribution, and customer service. The degree to which manufacturers are able to streamline their operations and improve productivity has a direct impact on the quality of their customer relationships, business partnerships, and ability to scale. It makes sense, then, that a growing number of manufacturing companies are turning to new technologies and systems, for customer relationship management (CRM) and workflow automation, to drive efficiency, team productivity, and, ultimately, profitability.

To help other manufacturers considering a CRM, Insightly surveyed 115 of its manufacturing customers. The survey covered the following topics:

- User adoption
- Productivity
- Customer insights
- Return on investment (ROI) and revenue growth

This report reveals the survey results and key takeaways to help decision-makers and CRM administrators in manufacturing companies learn from their peers' experience as they evaluate their own CRM needs and expectations.
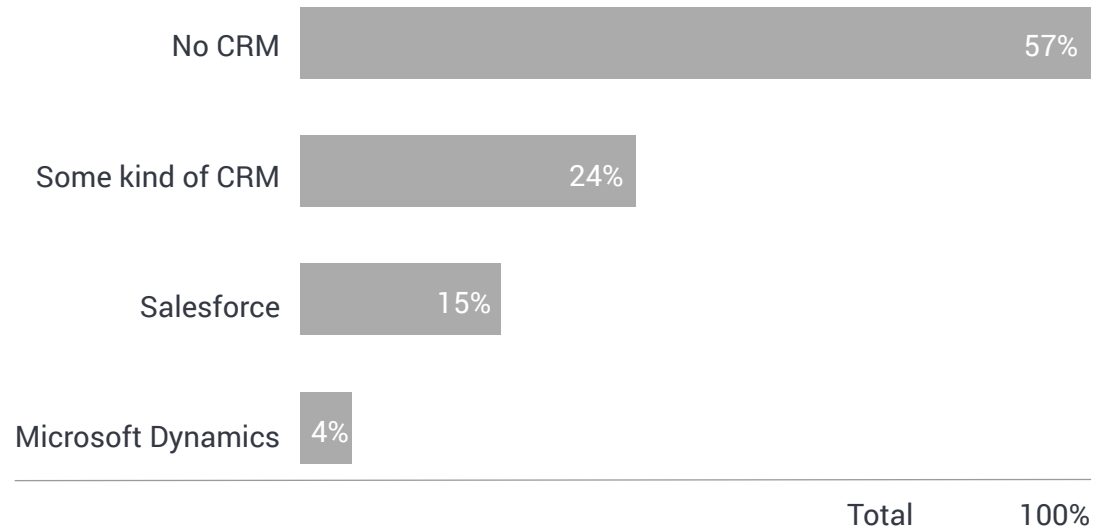
User adoption

For the purposes of this report, user adoption is defined as a process of adopting and using a new CRM by its intended users.

When asked why they chose Insightly CRM, 57% of respondents cited "adoption and ease of use" as one the key factors in their decision-making.

While the majority of survey participants did not use any CRM prior to Insightly, 43% had switched CRMs.

Type of CRM used before Insightly

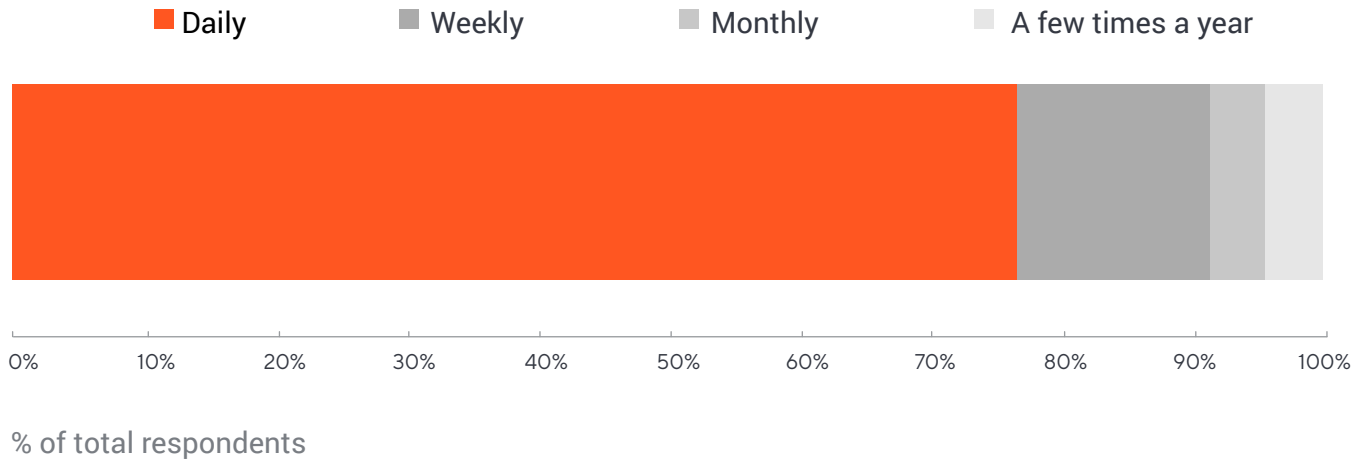|	
No CRM	57%
Some kind of CRM	24%
Salesforce	15%
Microsoft Dynamics	4%
Total	100%

User adoption (cont'd)

Even though adoption is the first step in ensuring ROI in any new technology, it is the consistent, frequent, and as-intended usage that determines long-term benefits. To that end, customers were asked how often they used Insightly CRM; 77% do so on a daily basis.

How often do Insightly clients in manufacturing use Insightly CRM?

■ Daily   ■ Weekly   ■ Monthly   ■ A few times a year

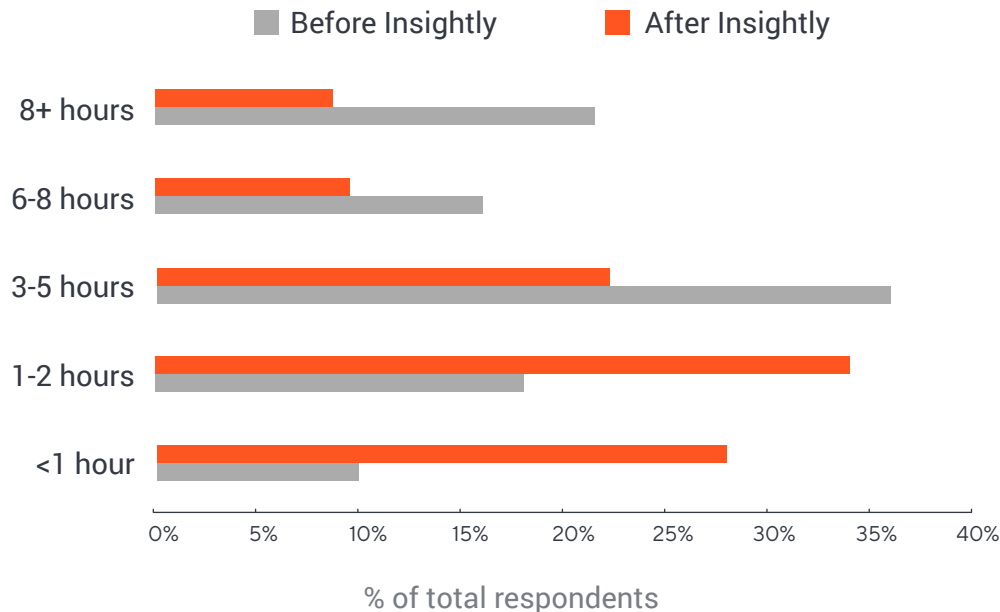| 0% | 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100% |

% of total respondents

Productivity

When it comes to productivity, the ability to automate repeatable processes is critical to minimizing human error and saving time across various workflows and departments.

In the survey, 42% of respondents reported improvement in "implementing repeatable business processes" (workflow automation) and 39% reported overall improvement in employee productivity as a result of using Insightly CRM.

One way to measure your CRM's more specific impact on productivity is to look at time spent on administrative and manual data entry tasks.

The percent of users who reported spending **less than an hour a week** on administrative tasks almost tripled after implementing Insightly CRM: 10% vs 28%.

"We knew we needed better, centralized control of everything we were dealing with for our customers. Using Insightly has provided that. In addition, Insightly's Kanban view lifts the level of coordination between our management and production teams to a level that other CRMs can't."

—Survey respondent

Get a demo of Insightly, the unified and affordable CRM.

Weekly hours spent on admin and data entry tasks

■ Before Insightly   ■ After Insightly

8+ hours

6-8 hours

3-5 hours

1-2 hours

<1 hour

0% 5% 10% 15% 20% 25% 30% 35% 40%

% of total respondents

Customer Insights

In the survey, 50% of respondents, Insightly customers in manufacturing, reported choosing Insightly CRM so they could keep all customer data in one place.

As a result of implementing Insightly CRM, 69% of respondents reported having a more accurate source of information on their customers, sales, and projects.

And, 47% reported improvements in understanding and reporting sales performance.

There's a clear benefit to having a single view of the customer, both in terms of aligning internal teams and reaching out to customers with the right message at the right time.

"We doubled the size of our customer database and have a clear and consistent way to market to a defined customer profile."
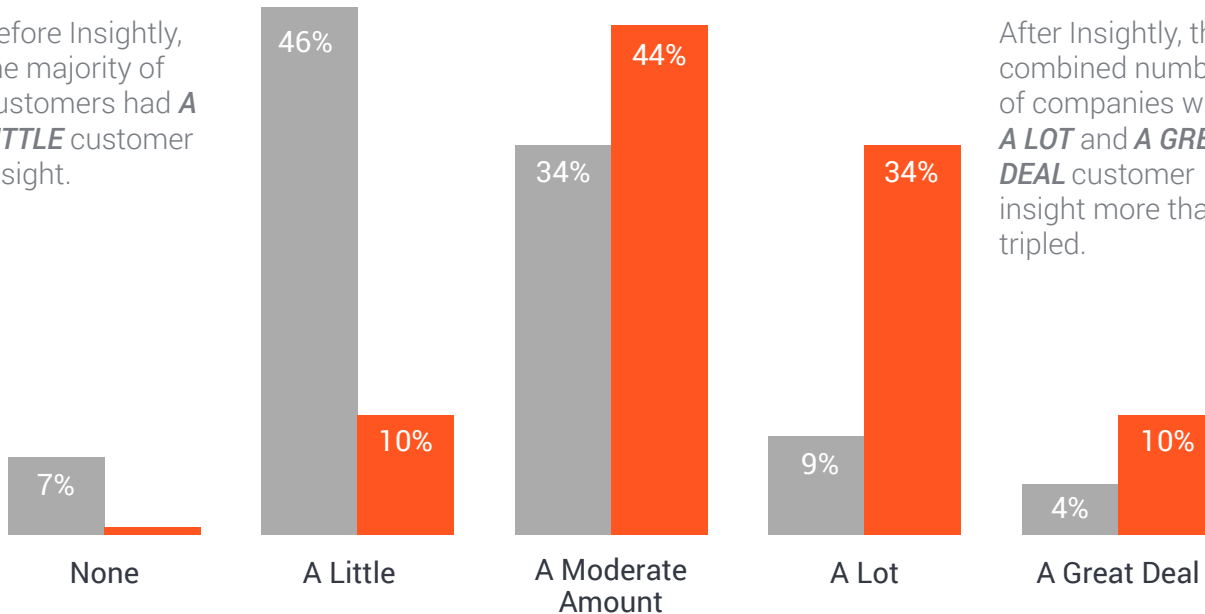
—Survey respondent

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How much insight do you have on your prospects and customers?

Before Insightly, the majority of customers had **A LITTLE** customer insight.

After Insightly, the combined number of companies with **A LOT** and **A GREAT DEAL** customer insight more than tripled.

	None	A Little	A Moderate Amount	A Lot	A Great Deal
Before	7%	46%	34%	9%	4%
After		10%	44%	34%	10%

Return on investment & revenue growth

Of those survey respondents who were able to observe results, 70% saw positive ROI within the first year of using Insightly CRM.
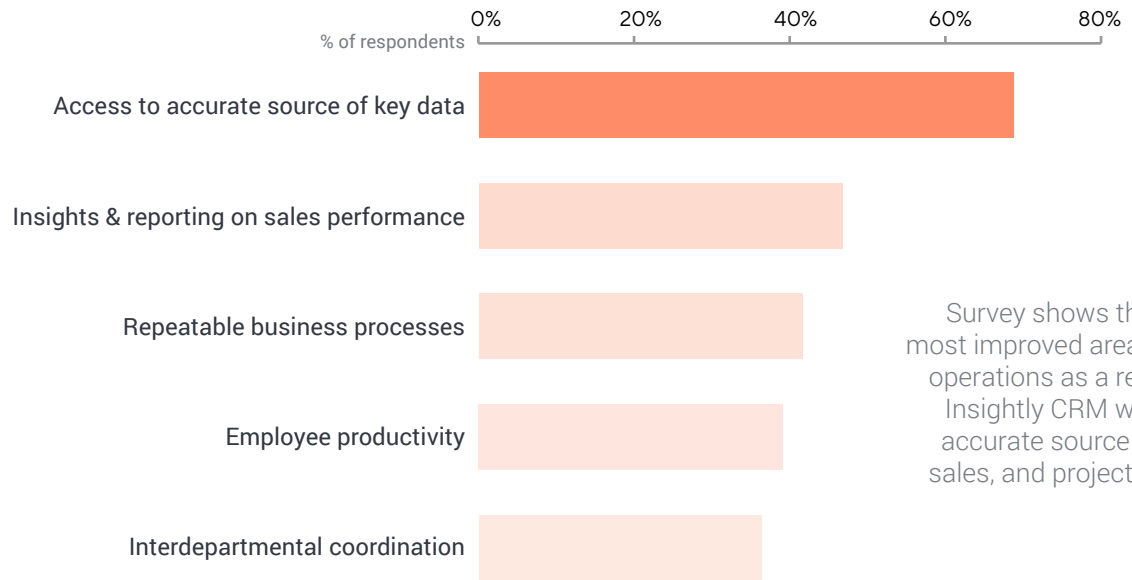
As far as revenue, survey respondents reported **18% annual revenue** growth as a result of using Insightly CRM.

In order to better understand the impact of Insightly CRM on revenue growth, we asked survey participants to select areas of business operations where using the CRM made the most difference.

Manufacturers improve business operations with Insightly CRM

Survey respondents reported improvements in the following areas:

% of respondents

0% 20% 40% 60% 80%

Access to accurate source of key data

Insights & reporting on sales performance

Repeatable business processes

Employee productivity

Interdepartmental coordination

Survey shows that the single most improved area of business operations as a result of using Insightly CRM was access to accurate source of customer, sales, and project information.

Keep in mind that in the same survey, 50% of respondents cited all customer data in one place as one of the reasons they chose Insightly in the first place.

Note: respondents were able to choose multiple options

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Manufacturing company triples revenue with Insightly CRM

Up and running with a new CRM in two months?

Then using it to triple revenue?

That's Sigma's story with Insightly CRM.

Go beyond CRM—meet the Insightly Platform

Now that you know the results that Insightly CRM can deliver to your manufacturing business, it's time to take a look at the full platform to help you unify your teams and deliver exceptional customer experiences.

Insightly CRM
Centralize your customer data and close more deals

Insightly Marketing
Create engaging customer journeys and grow pipeline with the power of marketing automation.

Insightly Service
Elevate your support and exceed customer expectations with a full-function customer service ticketing application.

Project Management
Convert deals to projects, and manage deliverables to ensure everything is right on time every time.

AppConnect
Stay connected to the apps you already use with a no-code/low-code integration platform.

Sell smarter. Work faster. Build lasting customer relationships.

About Insightly

Insightly elevates the customer experience by aligning sales, marketing, and service in one platform. Built to deliver key customer insights across all teams, Insightly's unified CRM helps organizations sell smarter, grow faster, and build lasting customer relationships. Insightly is trusted by more than a million users worldwide. For more information, visit insightly.com.

See Insightly in action.

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