CRM Buyers Guide

How to choose the right CRM software and supplier

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CRM Buyer's Guide

How to choose the right CRM software and supplier

Whether you are considering investing in CRM software for the first time or you are replacing an existing solution, this guide is for you. We want to help you make the right choices to make sure your CRM implementation is a success. This guide provides all the information you need to choose the right software and supplier, and help you identify potential 'mine fields' along the way.

Within this guide you will find hints and tips on...

- What a good system should offer you

- What to look for when selecting a system

- How to choose the right CRM software

- What to look for in a supplier

- Tips for implementation success

- How to "future proof" your investment

What exactly is CRM?

Put simply, customer relationship management (CRM) software helps you to manage your business relationships, include customers, prospects and suppliers. It is a single solution used by sales, marketing and customer service functions to manage all data and processes.

Top Tip

A good CRM solution will empower your business to do more. Providing your entire workforce with a real-time view on client relationships, conversations, opportunities, leads, and conversions. Streamlining processes to improve productivity, resulting in a sound return on investment (ROI).

What will a good CRM system do for me?

A good CRM solution conversions, increase win rate, drive growth by fixing leaky sales pipelines, increase productivity, enhance customer service and retention and help you make smart business. These decisions will help gain deeper insights into customers, their markets, buying patterns and turn them into actionable decisions based on real data.

Get it wrong ✕

You could end up with a system that's not fit for purpose, creating information's silos and a resurge of old habits.

Get it right ✔

A CRM system provides a central place where you can store customer and prospect information. You can then use this information to build a more accurate picture of your customers, allowing you to approach them with the right product or service at the right time.

The Benefits of a CRM system

Convert more leads into sales

Nurture your leads through the buying cycle and maintain appropriate contact until they are ready to buy.

Increased satisfaction & retention

Profile your customers for better targeting and understand buyer behaviour, increasing retention by 27 %.

Enhanced customer experience

CRM allows you to build up a comprehensive picture of your prospects/customers over time which allows you to understand your buyers better, helping you anticipate their needs and deliver products and services to meet them.

Actionable insights

With accurate reporting and access to real time data, you are able to make faster and smarter decisions and forecast accurately.

Improved productivity

A well-implemented CRM system can reduce the use of inefficient and manual processes, improving productivity by 30%.
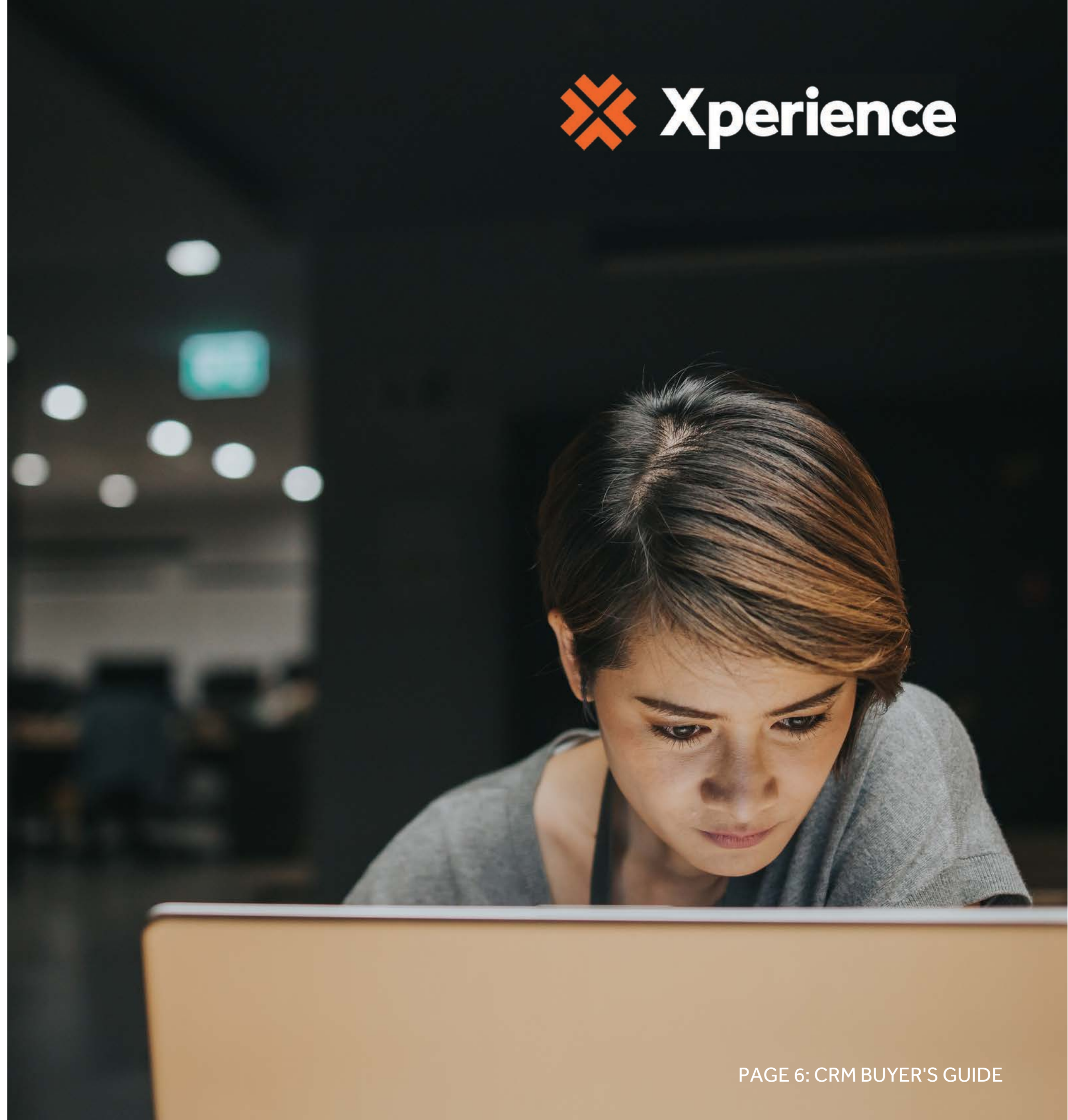
How to choose the right CRM Software

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What works for one business may not for another. Therefore, it's important to look for a solution that meets your requirements. Key aspects to consider:
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Integration

While CRM software is powerful on its own, integrating your CRM with other tools across your business will make your job so much easier. Ideally, your CRM should integrate seamlessly with your ERP systems and your calling productivity and collaboration tools such as Microsoft 365.

ERP Integration

Be sure to consider a CRM system that could integrate with your ERP system. It's important to take into consideration that with any CRM system, although you currently might not need that integration with another system, you may need it in the future.

Customisation

No two businesses are the same and it is unlikely an off-the-shelf product will match how you operate exactly. Look for a solution that can be adapted to reflect your processes, including personalised dashboards, reports and workflows.

Reporting and Intelligence Insights

Many software solutions offer standardised reports, however, the option to customise them or build your own will prove invaluable. Look out for CRM business intelligence tools such as power BI, business insights and KPI reporting.

Mobility

With flexible and remote working on the rise, mobility is a significant driver for the adoption of business software. Look for a CRM solution with Cloud or mobile accessibility, enabling secure, anytime anywhere access.
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Support

Selecting a system available from multiple partners provides greater support options. Look for a supplier who can offer a range of support services to meet your business needs.

On-Premise or Cloud?

When it comes to implementing a CRM solution, one of the areas that is often forgotten is the hosting or install requirements. Traditionally CRM solutions have been installed on-premise or in the cloud. However, many key CRM providers main offerings are pure cloud based solutions, allowing you to implement your solution without having to take on the task of an IT refresh or upgrade at the same time. Things to consider:

On-Premise

- Requires large upfront purchase for software licences and hardware
- High annual maintenance costs for support and functionality upgrades
- You are responsible for the data security
- You are responsible for maintaining your IT Infrastructure
- You enter into a hardware refresh cycle

Cloud

- Low up-front cost
- May reduce the complexity of your existing IT
- Faster implementation time
- Monthly Fee
- Scalable and Flexible
- Centrally managed

How much will it cost?

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Every customer has different requirements that will influence the cost of the project. These can include:

- **Business size**
- **Number of users**
- **Functionality**
- **Customisation requirements**
- **Deployment Method**
- **Support needs**
- **Integration and Data Migration**

Benefits of Cloud over On-Premise

The benefits of cloud over on-premise includes flexibility, reliability and security, cloud removes the hassle of maintaining and updating systems, allowing you to invest your time, money and resources into fulfilling your core business strategies. Providing real-time access to systems and data from a variety of devices regardless of the location and with guaranteed up-time of 99%, cloud is becoming the number one choice for UK businesses, with adoption rates reaching 88% in 2018.

How to avoid paying twice?

When looking for a CRM Solution, its important to think about your future needs as well as your current objective.

- Can I easily add/remove users if your business grows?
- Can I phase the project to increase user adoption
- Can I easily add more functionality?
- Are my upgrades included in the price?
- Software upgrades can be costly, therefore if you decide not to consider the future, you could end up paying twice...

Checklist

To help you make your decision, please use our buyer's checklist. Before embarking on a project, get your homework done first:

- ☐ Evaluate processes within each department
- ☐ Put together a team to work on your project
- ☐ Appoint a project leader
- ☐ Form a list of key functional requirements
- ☐ Start discussions with supplier(s)

**Things to discuss with your supplier
The options available to you:**

- ❯ Accessibility
- ❯ Functionality
- ❯ Security
- ❯ Scalability
- ❯ Deployment
- ❯ Training
- ❯ Support
- ❯ Installation process (Agile vs Traditional - What are your options?)
- ❯ Timescales
- ❯ Pricing

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