



ENABLING TEN SERIES

10 QUESTIONS TO ASK WHEN SELECTING CRM SOFTWARE.

When it comes to choosing the right customer relationship management (CRM), system for your business, it's important to understand all the benefits of an integrated CRM system before beginning your system selection process.

When you launch into a CRM implementation, your choices may impact every person within the business as a true CRM is an enterprise-wide application and tool. These 10 Questions to ask when selecting CRM software have been collected from executives, managers, customers and consultants who have had experience with implementing, using and supporting CRM solutions.

As a CRM Solution Provider with over 60 active CRM sites, Enabling has the experience and expertise to further assist you with your CRM enquiries or to answer any additional questions you may have about selecting and implementing a CRM solution.

1: Have the right reasons for wanting to implement a CRM system

Deciding to make the change and start using a CRM solution is an important step for many companies to start improving productivity and efficiency. However, your company has to be prepared to adapt and change in order to get the most out of CRM. Implementing CRM to its full potential will require that all users are aware of its features (and encouraged to use them!) - otherwise there is the danger that CRM will become just a contact management system, rather than your relationship management system. So before proceeding make sure that you are committed to improving your company's efficiency and effectiveness when dealing with clients.

2: What are core 'out of the box' features of the CRM solution?

When selecting your CRM solution make sure that you choose the one that is right for your company. The best solution may not always be the solution with the flashiest features or highest number of 'extra's', but rather the solution that can be moulded to suit your business practices and processes. So whenever selecting a CRM make sure its features, options and enhancements will closely match what you aim to get out of the application.

3: What are the upfront and annual costs associated with the solution? How much time and money is required to customise or tailor the solution to fit your needs?

When searching for your CRM keep in mind that low initial investment fees do not translate directly into low overall costs. You should think about how long you wish to use the software for be it for the next 3, 5 or 10 years, and judge the CRM on how much it will cost you over its life, not just in the first year. Also, make note of how much customisation to the CRM is required for it to fit your business processes as each customisation will increase the total cost of the system.

4: How easy is the solution to use?

As CRM is most effective when deployed across multiple departments of a company it is important to ensure that the CRM is user friendly. The importance of this should not be underestimated as employees who are less confident with a computer will become frustrated with a solution that is not intuitive to the user, potentially undermining the benefits of a CRM.

5: Does the solution have the flexibility to meet the changing needs of your business?

IT is important that when you make your decision on a CRM to use that you choose a solution that is flexible enough to meet changes in your company. Shifting CRM strategies may include delivering CRM to your sales team, access via hand held devices or integration with other business systems. If you plan to expand overseas, you will want CRM to be able to expand overseas with your company, if you plan to acquire other businesses, you will want CRM to be able to expand and integrate into those businesses as well. These considerations should be given serious thought before committing to any CRM solution.



6: Does the business solution provide and allow for future growth?

Changing business software is something that your business should not have to do every time rapid growth occurs. Make sure that the solution that you are choosing is scalable, does it meet your needs now, and potential needs in the future. Ask for references of some of the smaller or bigger sites that the solution provider has operating the software you are looking at.

7: Are there examples where the solution has been successfully implemented in your industry?

Search around and investigate competitor's solutions for CRM, studying solutions that they have used may allow you to avoid the problems that arose from them. This may also help you to define what you really want to get out of CRM. Be sure to look broader than your immediate industry and investigate how another company perhaps a similar size and with similar operations has implemented CRM. Discussions with various companies with CRM could also help lead you to a CRM provider with a good reputation. When you do select a CRM provider, make sure they have a proven success rate and verifiable experience with the design, implementation and ongoing support of CRM – it is unlike other types of business systems and requires specific skill and knowledge.

8. Are there a number of ways I am able to deploy the solution? What are the positives and negatives of each?

Ask any potential provider how they intend to roll out your solution. It may be more effective to roll out the solution in stages with certain departments coming on at separate times to alleviate the stress of training all of the company's staff at one time. Alternatively it may be easier to roll out the system company wide early so that its benefits can be felt company wide. Also ensure that the development cycle of the project fits in with your needs and expectations. A fast development cycle will keep the project on the forefront of the minds of those involved in it, however costs may be greater for a fast development time and there may be more errors and problems that arise as time is more critical. A longer development time will give everyone time to test and debug systems before they are implemented, however it is necessary to ensure that development continues along at a steady rate.

9. How easy is the solution to implement?

The ease of implementation for any CRM system will depend on the complexity of the solution design. If you are happy with the features that are provided 'out of the box' then this process should be very easy. A good CRM solution will also provide basic customisation or flexibility out of the box – and should enable an IT savvy user to manage this component of the system design. With increased complexity of implementation will come an increased amount of time and money spent fixing unforeseen problems and errors. Ask the CRM provider how you may be able to assist in the implementation. If the system is intuitive in terms of set up and data import, then this is a good indication of the architecture and long term support required (or more importantly not required), from your CRM provider.

10. Data Integration

When selecting a CRM look to see how good it is at integrating data from other applications. Your CRM solution should not complicate how you currently do busy, but streamline it, so go for a CRM solution that will integrate into your current software. Many CRM systems will integrate into the Microsoft Office package and synchronize emails with outlook, but CRM can also link with accounting financial systems as well as becoming an online forum of sorts for your employees.

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