

CHOOSE THE RIGHT CRM IN 6 STEPS

Your checklist on how to select the right CRM



FindMyCRM

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KNOW WHAT FEATURES AND FUNCTIONALITIES YOU NEED

The average business takes five months to choose the right CRM. For larger enterprises, the process takes closer to a year. Why is choosing a CRM such a drawn-out process?

Software companies have sophisticated sales teams who know how to pitch their product aggressively. If you don't have a clear idea of what you're looking for, you can be pulled in many different directions. You may end up stalled by indecision, thinking every CRM vendor is an equally good fit. Worse still, you could end up choosing the wrong CRM platform.

The more organization and planning you do, the quicker and easier the decision will be. Before shopping around, take a close look at your business. What are your company's goals? What pain points do you want to resolve?

CRM success depends on asking the right people the right questions. So, gather your key stakeholders together—executives, staff, and customers—and conduct an internal review.

QUESTIONS FOR EXECUTIVES

- What are the most inefficient processes in your company?
- What operational processes and workflows need to be added?
- Who is going to use the CRM? Do you need a CRM that works for all departments? Or do you want a CRM that specializes in one area?
- How do you want to visualize company data?
- How much automation do you need?
- Do you need a CRM tailored to your industry? You can choose the right CRM customized for virtually any sector—real estate, health care, manufacturing, and hospitality, just to name a few.
- How much time do you have for implementation and training?

QUESTIONS FOR EMPLOYEES

- What are your primary duties?
- What tasks stand in the way of your primary duties?
- What resources do you need more of?
- Can you describe your workflow and any bottlenecks?
- Are there any tasks you'd like to see automated?
- What is the most common difficulty you face with customers?
- Who do you communicate with most?
- How is communication with customers? How is it between departments?
- Which daily activities give you the most stress?
- Which daily activities give you the most return?

PAY ATTENTION TO CRM's UX

Even the most sophisticated software is worthless if your staff doesn't use it. It's critical to consider user experience when selecting a CRM. You don't want to choose a cumbersome tool that employees resent using. It may be rejected or filled with fictional data.

A user-friendly CRM will result in higher rates of adoption. So, prioritize the UX and find a CRM that folds easily into your staff's routines. Most CRM vendors offer a 30-day trial so employees can test drive the product. If you find the platform isn't user-friendly, it's not the right software for your business.

DOES IT WORK WITH OTHER SOFTWARE THAT YOU USE

Technology drives efficiency in a business. But too many tech tools can slow you down. You have to jump from system to system to complete your tasks. Plus, the tools don't "talk" to each other, forcing you to enter data across multiple systems. This ad hoc approach to technology can create unnecessary stress and confusion for employees.

A CRM won't add to your stack of technologies—it will streamline them into a single platform. Imagine being able to access all your third-party apps and integrations from a single dashboard, including email, social media accounts, and marketing tools. It's possible with the right CRM.

Before purchasing a CRM, check the app store to ensure it integrates with the tools your business relies on most.

HIDDEN COSTS OF CRM

No one needs to tell you price is an important factor when selecting a CRM. But you may not know how to calculate the 'total cost of operation.' That's industry-speak for the unexpected costs that may arise when implementing your new software.

Some of the hidden costs to look out for are:

PRICING TIERS

Be sure the features you want are included in the pricing tier you can afford. Also, look to the future—is the CRM affordable throughout all its tiers? As your business grows, you may need to move to a more expensive subscription with added functionality. Calculate whether the solution will remain cost-effective as you scale.

CAPS ON DATA

Some CRMs use data caps to squeeze more money out of their customers. Ask the CRM vendor whether there are any storage or contact limits.

INTEGRATIONS

Most CRM systems offer hundreds of third-party apps and integrations. Integrations allow you to plug your favorite tools into the platform seamlessly. They also provide a way for you to enhance and customize your CRM. But they come at a cost. Check the app stores for pricing and take note of the cost structure. Is it a monthly subscription, one-time licensing fee, or pay-per-user?

DATA MIGRATION

Transferring data to your CRM takes time and money. Plus, some systems and apps require ongoing data migration. It's crucial to develop a data migration strategy so you can budget for the cost.

CUSTOMER SUPPORT

Some CRM vendors monetize customer support. You may be subjected to limited hours and long waits unless you subscribe to their premium service option.

CRM CUSTOMIZATION

CRM is an effective tool that can improve efficiency, collaboration, and customer relationships right out-of-the-box. However, it is unlikely to match your business processes and needs precisely. What's more, you don't want your CRM functioning exactly like your competitors. Where's the business advantage in that? The ideal CRM will allow for some tweaks to make the solution truly yours.

The degree of customization varies between vendors. Niche solutions like Pipedrive tend to offer less flexibility, whereas large enterprise systems like Microsoft Dynamics abound with customization options.

Most CRMs will allow you to customize at least some entities and fields-no coding needed. All that's required is a basic understanding of the system and its data structure. The vendor's app store will provide add-on tools to further customize and enhance the CRM's capability.

ANALYZE THE DATA SAFETY

As Clive Humby said, data is the new oil in today's economy. For the average business, it is their lifeblood. When you turn company data over to a CRM, you are placing your most precious resource in the vendor's hands.

For this reason, CRM is particularly attractive to hackers. All your customers' private information, such as credit card numbers, medical records, biometrics, and other personally identifiable information (PII), is housed in one place. This presents a veritable goldmine to cybercriminals.

It is imperative to choose the right CRM vendor that abides by the strictest data safety protocols. If a vendor isn't transparent about their security systems, it's a massive red flag.

SELECT THE RIGHT CRM TOOL FOR YOU

There's no one-size-fits-all formula for how to choose the right CRM. Every business is unique and will define CRM success differently. To find the best software for you, evaluate your business processes and come up with a CRM feature checklist. The best CRM solution will meet those requirements, as well as being secure, customizable, user-friendly, and cost-effective.

Are you still having trouble choosing between vendors? Try the FindMyCRM selection tool [here](#).



FindMyCRM

Your guide for choosing the right CRM