Checklist to finding the best CRM Tool for your business needs

Thinking of getting a new CRM system?
This checklist will help you find the right one.

Whether you're a B2B or B2C, one of the most valuable and potentially lucrative tools that you can buy in for your business is a customer relationship management system (CRM). Find the right one and the best fit for your business and it could help transform your bottom line.

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The best CRM system for your business

A great system should do exactly what it says on the tin – help your business to effectively manage and nurture relationships with existing customers, new leads and even the wish list, at every stage of the sales process. These relationships take time to build and develop and are one of your greatest assets, so looking after them properly is essential. And that holds true whether you're an SME, global corporation, or anything in between.

A CRM system should help you delve deeper and pull together information that will **improve service levels, customer satisfaction and encourage customer loyalty.** It can also help make teams more efficient, so they spend their time and efforts in the most productive way – for example, ensuring leads are never missed and that they are recorded, followed up on and returned to. Existing customers should feel valued and be spoken to regularly, encouraging their accounts to grow.

Advances in the digital world mean **CRM systems are now far more intelligent and sophisticated** than they used to be. They can be fully integrated within all your channels of communication, they can be automated, they can record and analyse an amazing level of detail and even make a great cup of tea….well, almost (they would know how you like it at least!).

But with literally hundreds of different solutions to choose from, finding the right one for your business is a process that takes time and thought. So where do you start?

Google is not the answer

The worst thing you could do is just search the internet for the top rated CRM without first giving some thought to what your individual business needs. Instead, **start by taking a look at your business and teams as they currently stand.** What do you need a CRM to be able to do? Where could it assist you? If you have one currently in place, be honest about any problems and areas it is lacking.

Know where you're headed

It's not all about the here and now - where do you expect the business to be in a year? Two years? Three years? **You will need a system that can scale up with you** and adapt to changing company goals. **It will always be wiser to invest in something designed for where you are headed, rather than where you are now.**

Plan your process

What processes do you currently have in place for managing customer relationships and handling new leads? **What's working and what's not when it comes to collecting, sharing, managing and maintaining data?** What information are you getting and what are you missing? And how is the data then used?

Many businesses actually miss this vital point – the need to **outline a clear process before searching through the software options.** It may take some time to do but will be crucial when it comes to finding the right one for you. You need to set out what your requirements are as this will help you pinpoint the features you need to be able to meet them.

People vs products

An important point to add is that when looking at your current processes, make sure you give some thought to **whether it's the people or the products that may be lacking.** While there may be team members who are always reluctant to spend time on what they see as 'admin' there are also all sorts of barriers that put people off using a system and that could be an underlying cause. For example, if they don't understand it, can't see the benefit, don't see it as a set process to follow, find it too difficult, too slow or it's always crashing, or if they haven't been properly trained. **Think how you will manage these issues before you introduce a new system.**

Trials

Consider any new CRM system from the point of view of the **people who will be using it the most.** It may be a very different experience for someone using it 8 hours a day to what you see on a test site. **Can you do a trial?** If so, how long for and with what functionality included? Who could take part in the trial and give you the most useful feedback? **This will help with team buy-in, which will be a huge advantage later on.**
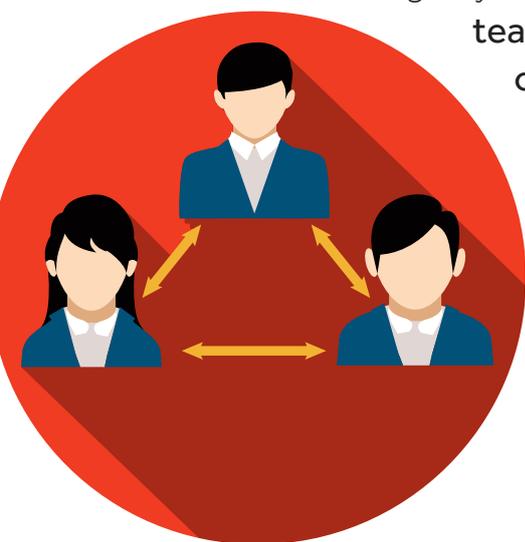
Finally when it comes to implementation, **what ongoing technical support is offered?** How easy will it be to adapt the system to do exactly what you need? And on the training front, what introductory and ongoing training is going to be needed?

We have compiled a checklist of all sorts of possible points to consider, discuss and decide on before you invest in a particular software.

1 As a first step sit down with a new document, go through this list and decide for each item what the **appropriate answer is for your circumstances.** This in and of itself is a process during which you will figure out what the best decision making approach is for your company.

2 After you have written your own brief of what the new CRM should be capable of in the first step you can **give each item a specific weight.** Ask yourself what the truly important items are and know why they are important to you.

3 Lastly put your insights into a spreadsheet and start comparing solutions.

The look within first

Why do you want to invest in a CRM system?

Tick all that apply

- [ ] You need more **organization** for the information gathered around contacts, leads and clients

- [ ] You need more **insight** into the behavior of the people your business is connected with and your employee's performance

- [ ] You need to keep records and want to collect **historic data**

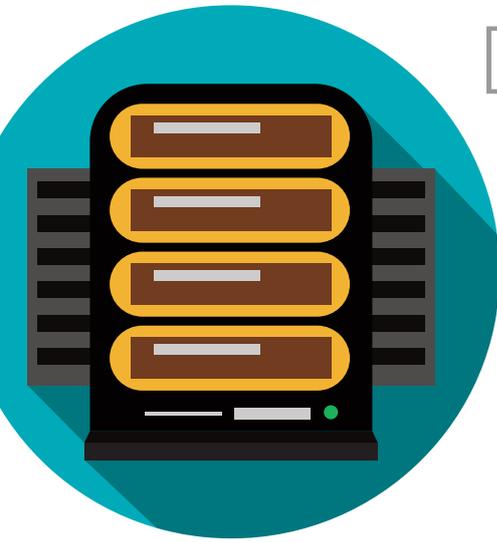- [ ] You want to increase your team's **productivity**

- [ ] Other (list)

_____

_____

_____

Questions to ask yourself:

What is your current process?

Describe tools you currently use:

How are, if at all, notes about emails, calls, meetings taken? Describe:

_____

_____

_____

Data collection

Which of these areas are you currently collecting data about and which do you want to collect data on in the future?

What	Currently collecting data	Want to on collect data in future	Importance it holds in helping you achieve company goals (1 not at all, 5 very important)				
			1	2	3	4	5
General contacts	☐	☐	☐	☐	☐	☐	☐
Sales pipeline	☐	☐	☐	☐	☐	☐	☐
Incoming leads	☐	☐	☐	☐	☐	☐	☐
Website leads	☐	☐	☐	☐	☐	☐	☐
Unconverted leads	☐	☐	☐	☐	☐	☐	☐
Sales orders	☐	☐	☐	☐	☐	☐	☐
Customer data	☐	☐	☐	☐	☐	☐	☐
Customer complaints	☐	☐	☐	☐	☐	☐	☐
Customer service	☐	☐	☐	☐	☐	☐	☐
Customer collections (payments)	☐	☐	☐	☐	☐	☐	☐
Staff activities	☐	☐	☐	☐	☐	☐	☐
People metrics	☐	☐	☐	☐	☐	☐	☐
Services delivery	☐	☐	☐	☐	☐	☐	☐

Digging deeper

More questions to ask yourself:

– How diligent is your team currently in terms of collecting the data?

– If not enough data is collected, describe the reasons why not. Lack of system? Lack of tool? Lack of training? Lack of goodwill?

– What about the current data collection in your company is working and what not?

– Map the current process

– Map your ideal process

– If the process needs to change, describe why and in what way

– Who is on the CRM purchase team? Name them here:

manager(s)_____

IT_____

end-users _____

top-exec _____

other, who? _____

– Who is going to do the trial and test the shortlisted systems?

– What type of reports do you need beyond opportunities closed and lost?
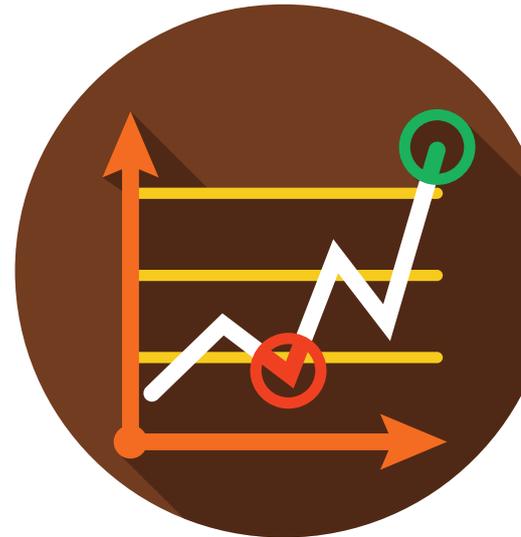
Decisions, decisions

Decisions to make before deciding on a system:

- On-premise solution or cloud-based system?

- What is your BYOD policy and requirements

- How important is mobility in your CRM process?

- What growth do you expect in the next 3-5 years

- What customization will you need? Do you have particular vertical market needs?

- Will a SMB solution be good enough or do you need to look towards an enterprise solution?

- Budget, including cost of software, training, administration, maintenance and support

- Integration needs: which other software are you using that might need to connect to the CRM

  - Are there any regulatory requirements you need to consider? Privacy protection laws vary from country to country, your chosen system needs to comply

Do your research

**Things to find out about the CRM systems
you want to shortlist:**

– Do the features offered cover your crucial needs?

– Have you separated the "nice to have" needs
from the "must have" needs?

– Implementation process

– Anticipated training period

– Level of support

– Track record of company

– User reviews

– How is the contact database updated? How much is this
process automated and linked into online sources of
information (e.g. social media channels)

– How long is the trial?

– Does the reports capability satisfy your particular needs?

– Who owns your data? make sure you do.

*Tip: prepare a spreadsheet with columns for all the important
features needed and requirements you have and then list each
Software you evaluate based on these criteria. Come to a
shortlist of no more than 3 choices.*

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