



*6 Steps*  
TO SWITCHING CRM



Change in the corporate world isn't always easy. When you think of big transformation projects, new leadership or restructuring, you tend to think of disruption and upheaval.

But usually change – when it is done properly - is good. There may be teething problems and you might encounter resistance, but the end result will benefit everybody.

Bear this in mind when you consider your CRM solution. In the last 20 years, CRM has become the predominant tool for any sales-led organisation - if you're a company with no CRM in place, it's a bit like going into battle for market share with no weaponry. CRM has always helped companies to improve the sales process, but as a principle and a technology, it has changed beyond all recognition in those two decades.

CRM used to be a standalone application with limited functionality. This might have served your company well at the time – and it might still serve your company well – but the CRM of today is light years ahead. From assisting lead generation and nurturing sales pipelines, to monitoring team performance and automating elements of the marketing, sales and services process, CRM generates the type of insight that helps gives companies a real competitive advantage.

So if you already have a CRM solution, but it is holding your organisation back, hindering your growth and stopping your company from being the best it can be, then maybe it's time to change.



# WHERE *you are...*

In the lifecycle of CRM, your organisation could well be at one of the following stages:

1

## First timer

Your business has never had a CRM solution in place and you are getting by using excel spreadsheets, your outlook contacts, plus a dose of luck.

2

## Next step up

Your organisation implemented a CRM solution years ago, but has outgrown its functionality, which is hampering your growth and sales process.

3

## Clean slate

There are plenty of scenarios for this one. For example, you might have been burned by poor implementation or a bad relationship with your vendor. Or your CRM has been badly adopted and people are finding ways around using it. Or your organisation has an all singing, all dancing CRM solution, but can only use it to a limited extent – and it is costing you a fortune. Lots of organisations have gone down the Microsoft or Salesforce route, but although these are (expensive) market leading, well known solutions, they are usually best suited to large, multinationals and not the right fit for smaller organisations.

A lot of companies in these situations are afraid of change – they're anxious about the upheaval or making a bad decision – so they stick with the status quo. If you have ticked "yes" to points two or three above, you need to think about changing your CRM solution to help you create the right environment for your organisation to prosper. You won't regret it.



# WHERE *to start...*

## POOR IMPLEMENTATION, UNSUITABLE VENDOR

Badly implemented solutions can cause headaches for years, but it's important to understand why the implementation failed, so the same mistakes aren't repeated next time. Draw up your list of the best and worst attributes in your old vendor and its implementation team – what they did right and what they did wrong – and then what you are looking for in your new vendor. Look at the implementation approach and the solution itself. What is it about the solution that you like? What don't you like? Is it too complex for your organisation's needs? Too expensive?

## IT DOESN'T FIT ANYMORE

If you have outgrown your current solution, you need to comprehend the reasons why and what you want the new solution to do for you. You need to understand your desired outcomes from CRM – determine what you aren't getting from your current solution and what needs to be different. What new functionality do you need? And what would be a 'nice to have'? Think strategically about what your business needs to grow - map your requirements from that, back to the solution. You don't want to have to repeat that process again in a year or two so look ahead and think long term and strategically.



# A CHECKLIST *for switching CRM*

To approach a CRM switch, you need to clarify first and foremost your requirements and then have a clear plan in place that will help you achieve your CRM goals.

There is no silver bullet, but following these checks will help you distil what your organisation needs, find the best solution for your business and choose the most suitable partner that will smooth – rather than stifle – the implementation process.



## THE RIGHT LEADERSHIP

Some organisations are happy to hand over the CRM switching process to the technical team – after all, they have been looking after the old solution so they can get on with making the switch themselves, right? Wrong. Switching CRM needs to be a collaborative process. CRM is a business enabler, so the executive team, the sales and marketing teams and your technical people all have to be involved. You need to think about CRM from a strategic business perspective – how do you want your new CRM to transform the organisation? By how much should it improve the productivity of the salesforce? If you leave it to the technical team alone, the risk is the approach will be too operational – and they might get side tracked by the wizardry of new apps! It needs to be a holistic approach comprising all stakeholders if you are to get the right outcome.



## WORKSHOPPING THE BUSINESS CASE

Holding a forum with key stakeholders will help you to map your business requirements, establish clear objectives, figure out the budget and the ideal ROI, as well as identifying any potential risks. The resulting business case has to be a 'live' document that is updated and referred to as the project progresses. It's only by doing this that you will keep your eye on the CRM ball. Workshops are also great for assessing change readiness – ask your sales and marketing teams for thoughts on ideal functionality and any challenges they envisage. They will also help you identify any would-be project champions and any signs of change resistance.





## IDENTIFYING THE BEST SOLUTION

Firstly, the solution needs to be cost effective and customisable. It is important that the tool is easy to configure to your needs, rather than you having to change your way of working to fit the tool. So ask the questions – can you tailor it to fit easily with your processes? Will you be able to maintain it easily? What support will you need to make it your own? It's important not to get distracted by fancy and flashy gimmicks - you need the functionality to deliver your business objectives and the applications your company will actually use.

That's the problem with uber sophisticated tools like Microsoft Dynamics or Salesforce – for multinational organisations with large IT teams and big budgets, fantastic. But for an organisation of a few hundred people and a sales team of 20? Much of what these tools do is not relevant for your business, meaning you will spend far more than you need to. Be wary of over complicating your CRM environment. Ease of use will be the difference between adoption Vs rejection. It all comes back to your business case – if you know your requirements and also understand what you don't need, you should be able to identify the best solution for your business.



## FINDING A GOOD PARTNER

Finding the right partner is crucial. And you are looking for a business partner, not a vendor. A CRM switch is something you need to work on together. The problem with a lot of CRM implementations is that you may be dealing with multiple parties. A company might have bought from a vendor like Microsoft Dynamics or Salesforce, but the channel partner responsible for the implementation messes up. Who do you turn to?

You need to understand the relationship between the technology vendor and the firm that does the implementation, how it all works and how you'll be supported post implementation – and there are vendors out there who implement their own solutions! There are questions you need to ask potential suitors: Do you have clients like me? What's your track record? Do you have recommendations from clients past and present? What is your implementation approach? Do you have a proven methodology for switching organisations from the CRM I am currently using? Once you have chosen your partner, you are at their mercy – so it's vital to get it right.





## DATA MIGRATION

Data migration is the biggest concern for people – the pain of it, the risks associated with it. When it comes to data migration, the prospect of switching CRM systems can make even the most hardened IT manager wince with the prospect of what could go wrong. Make sure you choose a vendor with a clear path and methodology, one who has done this many times before. To prepare switching CRM solution, from a data preparation perspective, identifying any aged data and making sure your pipeline is as clean as can be for example is imperative – start as you mean to go on.

A key point is that you will be running your old CRM system at the same time you are building your new one and at some stage will be running them simultaneously - so a mechanism to synch the data between the systems is vital. With data, any fall over can have disastrous implications for your business, so it's important to get data migration right. And keep in mind the benefits you'll be able to gain once you are fully up and running on the new solution, with a clean set of data to work with!



## WINNING HEARTS AND MINDS

Finally, the most important part is getting staff buy in. It's all very well having a brand-new shiny CRM system but if you only have 20% user adoption, it's not working. Failsafe training - both at the point of launch of the new CRM and regularly afterwards, solution champions that can help "sell" the solution to their team mates and workshops to identify problems and detractors - this will also keep the feedback loop going... all of which can be fed into CRM system and process improvements. Your new supplier should help you with this – they should help you map the smooth transition from one solution to another and then help you communicate the benefits to your people. They should accompany you all the way. This is where a true partner, rather than a simple vendor - can make the difference.

Waving farewell to your current CRM isn't easy. You're used to it, the sales team manage with it and quite frankly, you can do without the disruption. But can you? What could you be missing out on? What's the opportunity cost to your business of not getting a better solution in place? Sometimes, the right thing to do is to take a deep breath and jump in. But you have to be prepared and you have to have done your homework. Choosing the right partner and the solution that best fits your business requirements is vital. Follow our checklist and you won't go far wrong.