

# 6 key checks WHEN SWITCHING CRM

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 AT THE MOMENT...

**1 Looking for the next step up?**  
Your organisation implemented a CRM solution years ago, but has outgrown its functionality, which is hampering your growth and sales process.

**2 Ready to start with a clean slate?**  
You might have been burned by poor implementation or a bad relationship with your vendor. Has your CRM been badly adopted and people are finding ways around using it? Has your organisation got an all singing, all dancing CRM solution, but can only use it to a limited extent – and it is costing you a fortune?

Ok, you've decided ditching your current solution is the right way forward. How do you go about it?

## A CHECKLIST FOR SWITCHING CRM



### THE RIGHT LEADERSHIP

Switching CRM needs to be a collaborative project, don't just give it to the IT team. Make sure sales, marketing and customer support all have an input into the system you choose.



### WORKSHOP THE BUSINESS CASE

Make sure all the key stakeholders are involved in putting together a live document that maps out the business requirements, the objectives, budget and ideal ROI. This document will then be the holy grail as you progress through your CRM transition.

### FIND A GOOD PARTNER

You need to find a partner you can trust and work with on this project. You need to know where your support is coming from and who to turn to throughout the implementation and beyond.



### IDENTIFY THE BEST SOLUTION

Your requirement list should guide your selection process. Ask questions like 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? These will help you find the best CRM for your company.



### DATA MIGRATION

This is most people's biggest concern. Make sure you choose a vendor with a clear path and methodology, who has done the process many times before.



### WIN HEARTS AND MINDS

You need to get the whole team on board. Make sure there is training from the launch date and regularly afterwards. Make sure you have champions that can sell the new solution to their teammates and get everyone using the system.

Waving goodbye to your current CRM isn't an easy task, you're used to it but what could you be missing out on? How much money are you wasting using your current solution? Sometimes you just have to take a deep breath and jump in.