

10 questions BUSINESS LEADERS SHOULD ASK

Finding a CRM system that will meet the requirements of your growing business can seem like a daunting task. There are numerous solutions to choose from but not all CRM will be suitable. In fact the primary reason analysts suggest that up to 50% to 70% of CRM projects fail to deliver a return on investment is down to poor choice of solution.

So, how can we help? Below are ten questions business leaders should ask of every potential CRM vendor to help you make the right choice.

Q1:

HOW EASY IS THE CRM TO USE?

If the CRM is complicated to use then adoption rates will be low, you'll need to spend more on staff training, and it will take longer to reap the benefits. Make sure the solution you choose is intuitive and that you'll be able to access information that you need without needing to rely on an expert.

Q2:

HOW ADAPTABLE IS THE PLATFORM?

Your CRM platform should be flexible enough to adapt to your business processes. You should not have to adapt your business to fit your CRM system. Make sure your platform allows for high levels of customization and can capture all the information you need it to.

Q3:

CAN WE ACCESS IT FROM ANYWHERE, USING ANY DEVICE WE WANT?

SaaS software benefits are widely known, plus if your sales teams are able to access information in real-time on CRM and also update it while they are offsite with customers attending an event or working from home, then they are much more likely to use it and see it as a valuable tool.

Q4:

ARE THE REPORTING TOOLS EASY TO USE?

Your CRM solution should offer quick and easy reports in the right format, with easy filtering, graphs, dashboards. These reports show you the information held on your CRM platform and allow you to make the decisions that will drive your business forward.

Q5:

WILL IT GROW WITH US?

Invest in the solution that's right for you today but with an eye on what you might need tomorrow. Ensure it can grow with you and avoid the need to switch to a new platform in the future.

Q6:

CAN I IMPORT AND EXPORT DATA EASILY?

For most implementations, transferring current data is the most challenging aspect, make sure that this can be done relatively simply before you commit to a solution. At the same time check that your data can be exported from its current system in a useable format.

Q7:

WHAT TRAINING OR SUPPORT IS AVAILABLE?

Check that you and your team will be able to access high quality, reasonably priced training on how to use your new system and which support packages are available.

Q8:

WHAT IS THE REAL PRICE?

Low headline prices often hide higher costs for implementation, support, training, and so on. Avoid nasty surprises in the future by looking beyond the license prices and getting a clear idea of the total cost and time to value.

Q9:

WILL IT INTEGRATE WITH MY OTHER APPLICATIONS?

CRM is at its most effective when it is integrated with other applications, pulling in information automatically and organising it for greatest efficiency. Ensure your solution has a good range of **off-the-shelf integrations**.

Consider also whether you will need to integrate with your existing marketing automation platform as CRM and MA together give you even greater insights into your business. You can also look to integrate your accounting software giving business leaders full visibility from lead all the way to cash.

Q10:

IS THE CRM A 'GOOD FIT' FOR YOUR BUSINESS?

It's easy to spend too much on a CRM platform, or learn later that license costs skyrocket when you need greater capacity. Many mid-sized firms also discover they never use many of the features that they're paying for. Look instead for a CRM that's tailored around growing businesses, offering enough functionality, but at a price you can afford – that's the one that's likely to deliver the best return on your investment.

Get more insights in our comprehensive [Guide to Evaluating CRM](#)