CRM 101

How to choose a CRM

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Investing in any new software is a significant decision, and choosing the right CRM for your business is no exception. There are numerous questions a business needs to address before implementing a CRM solution to maximize its benefits.

This guide will provide you with the questions and explore what items you should consider when choosing a CRM.

What do you need from a CRM?

The first step in choosing a CRM is to determine your specific needs. A small business has different requirements from a global enterprise. You will need to assess what the business objectives are, how a CRM system is going to help you achieve them, and how many people require access to the tool for it to work.

Key questions to consider:

- ✅ What are your goals for the CRM system?

- ✅ Which departments will use the CRM solution?

- ✅ How many people will use the CRM system?

- ✅ How will you ensure employees use the system?

- ✅ Is your business ready to implement a CRM system?

- ✅ If you have an existing CRM, what works well, and what would you like to improve?

- ✅ Can you try the solution before deployment?

- ✅ How quickly do you need to start using the system?
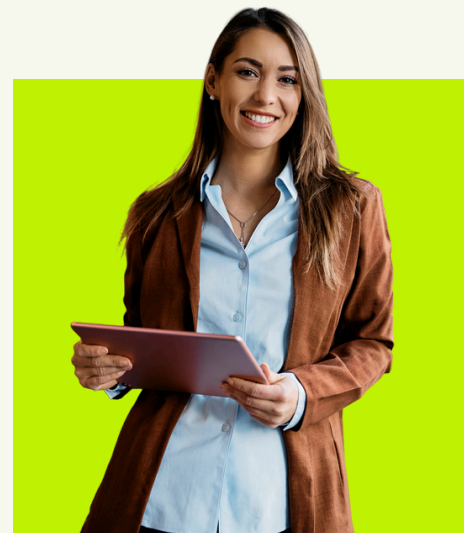
Global CRM software market reached **$56.2 billion in 2022** and should reach **$103.5 billion by 2027.**

(Source: BBC Research)

For instance, a mid-sized tech firm looking to scale its operations might prioritize a CRM that offers robust sales automation and marketing integration, while a small family-run business might need a CRM with strong customer service features and customization capabilities.

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3 steps to CRM success

Evaluate Organizational Readiness

Identify key teams and individuals who will be using the CRM. Choose a champion to drive adoption, understand their team's needs, and prepare for a smooth transition.

Tip: Conduct workshops or focus groups with potential users to gather insights and foster a sense of ownership.

Develop a Customer-Focused Culture

Before deploying your CRM, cultivate a culture that prioritizes customer relationships. This approach will enhance the effectiveness of your CRM and streamline existing processes.

Tip: Create customer personas and journey maps to help your team understand and focus on customer needs.

Set a Realistic Timeline

Determine your deployment timeline. A quick rollout may be critical for some businesses, influencing your choice of CRM.

Tip: Break down the deployment into phases, allowing for adjustments and troubleshooting at each stage.

74%

of businesses report increased customer satisfaction with a CRM.
(Source: Resco)

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Determining the right fit for your business needs

Deciding between cloud-based and on-premise solutions requires careful consideration of customization, flexibility, and other factors. Evaluate your needs based on the following questions:

- ✅ **Are you a start-up or scaling your business?**
  Start-ups might benefit from the flexibility and lower costs of cloud solutions, while scaling businesses might need more robust, customizable solutions.

- ✅ **Do you plan to move your entire IT infrastructure to the cloud?**
  Cloud solutions can simplify IT management and reduce costs.

- ✅ **Do you have an in-house IT support team?**
  On-premise solutions might require more technical support.

- ✅ **Do you need integration with existing software?**
  Ensure the CRM can integrate with your current tools and systems.

- ✅ **Are there legal requirements for data storage?**
  Consider compliance with data protection regulations.

- ✅ **Do you aim to reduce IT infrastructure costs?**
  Cloud solutions can help minimize capital expenditure on IT.

- ✅ **How quickly do you need the system implemented?**
  Cloud solutions typically offer faster deployment.

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Key decision factors

Cost and Capabilities

Larger corporations might benefit from on-premise solutions due to their extensive customization capabilities and existing IT infrastructure. Smaller businesses may prefer cloud solutions to avoid high upfront costs.

Resource Management

Cloud solutions can reduce the need for dedicated IT personnel, a significant advantage for SMEs.

Security and Reliability

Consider your internet reliability and data security requirements when choosing between cloud and on-premise solutions.

Compliance and Location

Ensure your CRM solution complies with data protection laws and consider local hosting requirements if necessary.
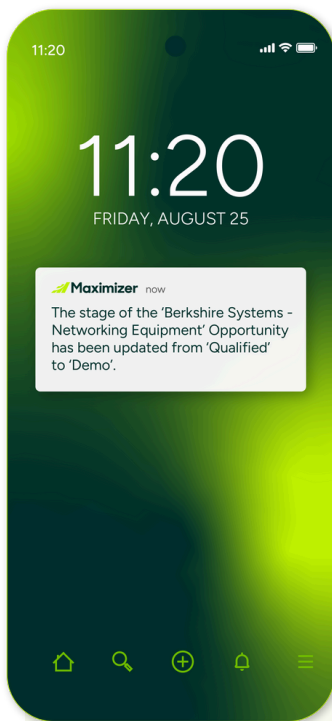
Tip: Check if the CRM provider has data centers in regions that comply with your local regulations.

91%

of companies with more than 11 employees use CRM software.

Source: CPSA

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Mobility: Accessing your CRM on-the-go

11:20

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FRIDAY, AUGUST 25

Maximizer now
The stage of the 'Berkshire Systems - Networking Equipment' Opportunity has been updated from 'Qualified' to 'Demo'.

In today's globalized world, mobile access to CRM systems is essential for maintaining flexibility and efficiency. Consider these questions:

✓ **Does your sales team operate remotely?**
Mobile CRM ensures they can access and update information on the go.

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✓ **How distributed is your workforce?**
A mobile-friendly CRM can support a dispersed team.

✓ **Do you support remote or working from home?**
Ensure the CRM offers robust remote access features.

✓ **Do you need off-site access to business information?**
Mobile CRM can provide crucial real-time data.

Benefits of Mobile CRM

Enhances sales operations by providing on-the-go access.

Improves planning and time management for sales teams.

Allows field staff to update the system in real-time.

SALESPEOPLE SAW A

26.4%

increase in sales productivity when using mobile CRM applications.

Source: Nucleus Research

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Integration and Customization:
Adding the features you need

A CRM should integrate with other systems and be customizable to meet your specific business needs.

- ✓ **Can your CRM integrate with legacy systems?**
  Integration is key for a unified workflow.

- ✓ **Do you use separate marketing or industry-specific tools?**
  Ensure compatibility with your existing software.

- ✓ **Do you need tailored data fields or automated workflows?**
  Customization can enhance efficiency.

Consider how customization needs can dictate the complexity of your CRM system and if your business would benefit from cloud-based software or an on-premise solution.

47%
of businesses state their retention rates have improved since CRM implementation.

Source: Software Advice

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Making your decision

Choosing the right CRM involves aligning with your business objectives and ensuring the solution enhances productivity. Identify your pain points, assess where inefficiencies occur, and select a solution that your team will embrace.

Engage with a few CRM vendors, request demos, and involve your team in the evaluation process to ensure the chosen CRM meets your needs.

ABOUT MAXIMIZER

For over 35 years, Maximizer has empowered businesses worldwide with its robust functionality. Offering flexible deployment options, cutting-edge security, industry-specific editions, and mobile access, Maximizer is the CRM solution of choice for thousands of businesses. Join over 120,000 customers globally who trust Maximizer to fuel their growth.

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