

# **CRM Buyer's Guide**

**Volume II: What's the Right CRM System for Me?**



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## Nine Questions to Ask When Evaluating a CRM Solution

The questions below will help you evaluate what solution(s) best meet your business needs and customer strategy. These are meant to help you organize your thoughts before you evaluate and choose the CRM solution suite that is right for you.

### What's the customer's role?

1. How do you track your customers today and what information is tracked?
2. What communication channels do you currently support (phone, email, web, etc.)?
3. Will your customers benefit from you a CRM system? How so?
4. How will implementing a new technology or customer strategy affect your relationship with the customer?

### What are your goals?

5. Which areas of your Sales, Marketing and Customer service processes could be more efficient?
6. Who in your organization will use the system?
7. What is the projected timeline for deciding on a solution?
8. What are some of the short-term goals to be achieved with CRM technology?
9. What are some of the long-term goals to be achieved with CRM technology?

Upon answering these questions, you should have a better understanding of what you should be looking for in a CRM system and what type of customer strategy you may wish to deploy.

## What to Expect During the CRM Buying & Implementing Process

Choosing a CRM solution should be straightforward and based on continuous feedback between vendor and client. But with a myriad of CRM technology in the market today, the evaluation of multiple CRM vendors can be confusing, time consuming and costly to any corporation. The following sample steps will help you know what to expect during the evaluation process.

### Step 1 (Self-Evaluation)

Before actively working with any vendor you should answer a CRM evaluation questionnaire or perform a company-wide CRM assessment. You should establish benchmarks and goals to determine if your project is going to be a success. In addition, you should assign an un-biased project manager to help with this initial self-evaluation and eventual CRM project.

## **Step 2 (Vendor Evaluation)**

Develop a weighted evaluation process to determine what is truly important to your business in a CRM solution. Once evaluation criteria is categorized, you should choose solutions to evaluate from both a vertical / industry perspective (best of breed) and horizontal perspective. Each vendor should provide you a high-level business demonstration of their capabilities. From there, you can narrow the choices—typically you will want to eliminate all but 2 or 3 vendors from contention. After a short list is created, you may wish to then re-evaluate goals and benefits based on presentations from each of the vendors.

## **Step 3 (Configured Demonstration)**

Highlight three or four key business scenarios that are critically important to the success of the project and ask each vendor to demonstrate how they would solve these issues. Along with these configured demonstrations / presentations, a more in-depth look at the technology should be performed so your team can understand the underlying technology limitations (or potential costs with technology configurations).

## **Step 4 (Proof of Concept)**

If you're still not sure of the final solution, you can ask for a Proof of Concept (POC). Most vendors will charge for this, but this is an inexpensive way to reduce project risk if you are not sure about key capabilities. You may wish to further configure the system to support your main business process, import your customer data and report and analyze on the process and/or data.

## **Step 5 (Decision)**

Evaluate the solution based on your trial run or configured demo and, if satisfied with both technology and vendor capabilities, purchase the solution. Ensure the decision is based on the planned lifetime of the technology under consideration and your expected relationship with the vendor. Also, choose a solution which you feel will best adapt to your evolving business needs, or market changes.

## **Step 6 (Implementation)**

Work with a vendor or certified partner / reseller to install and configure system. The CRM vendor or certified partner / reseller will be experts in this process and will help you understand the implementation methodology from first steps to go-live support. Ensure your company has a dedicated project manager for the implantation to help guide the CRM implementer and answer any questions or facilitate any potential business meetings to resolve implementation concerns that may arise.

### Step 7 (Training)

Outline your training objectives at the start of the implementation. Training can be provided in various ways: via online training, instructor-led training, or train the trainer methods. Each method has pros and cons, so it's suggested to take the best training approach for your company. You may want to receive training for your specific business scenarios, data entry and key performance indicators so users can gain a real-life training situation. A phased training approach is suggested (with multiple trainings offered over the course of the implementation), and spend as much time on training as possible to help answer the myriad of questions from your business users.

### Step 8 (Feedback)

Provide feedback to your vendor based on your real-life experience and offer suggestions for product, training, or solution improvements. It is strongly recommended to set up open communication for continuing dialogue as a CRM implementation is a long-term event; both sides will benefit from candid communications. Not only should you provide feedback to the CRM vendor, providing feedback to end users and managers and keeping open lines of communications flowing amongst internal team members about the state of your CRM business is just as important for a successful, long term CRM implementation.

## Conclusion

This document contains some great questions to ask of yourself when purchasing or implementing CRM solution. Understanding your customer strategy and the role your customers play in your business is the number one item when considering a CRM application and the benefits the solution will provide your company. Take time in establishing your CRM strategy, ranging from the team members involved to the length of the CRM implementation, and choose the right vendor that best matches your company strengths, short-term as well as long-term goals.



## About GoldMine

GoldMine is a leading provider of mobile relationship management solutions designed for small businesses. With over 1 million users managing over 1 billion relationships, the GoldMine CRM application is one of the most widely used relationship management technologies in the world.

The GoldMine solution enables organizations to build enduring relationships which enhances business performance through the improvement of employee productivity, customer and partner loyalty and better management of the entire business ecosystem. GoldMine is a division of FrontRange Solutions and is headquartered in Pleasanton, Calif.

To learn more about GoldMine CRM small business software for contact management and customer management, visit us at [www.goldmine.com](http://www.goldmine.com) or call:

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