



Independent Guide
to Customer Relationship
Management software

Ten things to consider
when evaluating and implementing
CRM solutions for your business

Introduction

Implementing a Customer Relationship Management (CRM) solution in your organisation will have wide ranging implications for lots of people in your team. Being forewarned and forearmed will ensure the project runs smoothly and you get buy-in from all areas of the business, particularly sales, to make your business sell more effectively.

This advice guide will help owner managers in SMEs plan wisely and consider ten things when deciding, evaluating, selecting and implementing a contact management or CRM strategy.

Ten things to consider

One

Vendor first, product second

Two

Powerful 'out-of-the-box' functionality in a simple to use interface, plus flexibility to deliver unique needs

Three

Anytime, anywhere deployment

Four

Ensure the software delivers benefits quickly to maintain momentum with your people and provide a rapid return on your investment (ROI)

Five

Flexibility to integrate seamlessly with the other software you use is essential

Six

Buy from a vendor with a large installed base of customers in your market and financial stability

Seven

A vendor that is committed to supporting its customers directly and through a network of business partners and developers

Eight

Choose a vendor who delivers exceptional technical support and business advice

Nine

Getting the adoption right will be the biggest factor in determining if the system will be a success

Ten

Avoiding the pitfalls is easy when you know them



One

Vendor first, product second

First and foremost you should look to choose the vendor first and the product second. Because it's not products that create the best software solutions - it's experience. Experience gained over many years of understanding business relationships, and turning that knowledge into products, services and support that fit UK businesses needs. And this buyer-seller relationship should be viewed as an ongoing partnership that can do much more than just help with managing your customers via software. It needs to give you business advice to support your business and give you the confidence and breathing space to concentrate on what's most important to you; to bring your business ideas to life and help you see where you could take your business next.

Two

Powerful 'out-of-the-box' functionality in a simple to use interface, plus flexibility to deliver unique needs

Software needs to have a strong core framework of CRM functionality that delivers over 80% of business requirements without the need for development work, but can be configured to deliver the remaining 20% that is specific to your particular processes, for now and the future.

Software needs to be intuitive and deliver a great user experience for all types of user, making everyone more productive.

Three

Anytime, anywhere deployment

Technology has changed the way businesses sell. And that means sales people need to be able to work anytime, anywhere. So software needs to be able to be accessed from anywhere. Mobile phones, PDAs, and any other type of communications device that is going to give sales people the information they need to perform more effectively.



Four

Ensure the software delivers benefits quickly to maintain momentum with your people and provide a rapid return on your investment (ROI)

Software needs to be easy to learn, allowing your staff to be productive very quickly. Migration of data from other software should be simple and straightforward.

Five

Flexibility to integrate seamlessly with the other software you use is essential

Using bespoke or best-of-breed software that works independently of each other means you have to spend time importing data or entering it manually. Integration of all your business software will save time and reduce errors.

Six

Buy from a vendor with a large installed base of customers in your market and financial stability

Software needs to provide you with the confidence that it will deliver what it promises, with case studies in your market that provide evidence of the benefits you would get by implementing it.

And you want to know that your software provider will be with you for the long term and that significant amounts of money are being invested to continually developing the software.

Seven

A vendor that is committed to supporting its customers directly and through a network of business partners and developers

Buying habits have changed significantly over the last few years and good providers make software available from a wide range of sources to suit customer choice.

Software should be available through a wide range of communities providing installation, customisation, support and training at a local level.

Eight

Choose a vendor who delivers exceptional technical support and business advice

More than two-thirds of people stop buying from businesses because of poor customer service. The ability of the vendor to understand your business and be able to deliver that support when and where you need it (by phone, email, and web), is paramount.

Your software provider should be your one-stop-shop for guidance and advice on any business advice, not just technical support to get your software installed and working correctly. That requires a true understanding of where UK businesses are right now - understanding things like redundancies, cost reduction, online submissions, diversification and selling globally.

Nine

Getting the adoption right will be the biggest factor in determining if the system will be a success

Choosing the best CRM software and vendor for your organisation can be quite straightforward. Getting the implementation right is often harder. Reluctant users will add the minimum of data they can get away with, or ignore it and continue to use their existing personal systems.

The following will help you get the adoption right:

- Roll the system out from the top, not the bottom. Get senior management bought in first and let them be seen using and benefiting from it. Use of the system will then be associated with seniority and the first new users will feel privileged to have access.
- Choose first users in each department who are advocates and who command the respect of their peers. They will spread the word and the rest will follow.
- Liaise closely with administrators at all stages and give them ownership of the data.
- Make sure that all managers use the system as the prime source of information when it is rolled out to their teams.
- Use the consolidated reports, such as sales forecasting, to manage the organisation and don't be tempted to go back to using spreadsheets. If that happens the onus on putting information in to a CRM system diminishes.
- Use carrots, rather than sticks to encourage sales executives to use a CRM system. But because sales people are reluctant to share contacts and pipeline, sticks may occasionally be necessary.

Ten

Avoiding the pitfalls is easy when you know them

Don't sit down and try and design the perfect CRM system that will meet 100% of each and every person's wish list. Get the sales teams as the prime designers of the system. Although the marketing department is one of the biggest beneficiaries, only the sales people can make it a success.

Don't just switch on the system and expect that everybody will just pick it up. New internal systems need to be sold and the roll-out planned carefully, with adequate training for all.

Don't forget that sales people can function perfectly happily without a corporate CRM system, and many prefer it that way. Use encouragement, carrots and sticks. Motivation is as important as understanding.

Don't think you can do it alone. Even if you've implemented a CRM system in the past, getting help from the supplier will reap benefits, as they will see the pitfalls that you don't.

Don't expect the data to be correct and complete. Make it someone's responsibility to own the data. A good sales administrator or marketing assistant will nag sales people to fill in the necessary fields.

Don't forget to make your MD use the system. If the MD and senior management are seen to use the system then that culture has a chance of permeating your organisation. Only if your whole management team jointly agree that a CRM system is a key part of meeting the organisation's objectives, and then use it will the full benefits be realised.

Don't think there is a 'best practice' for evaluating and implementing CRM for your business. The right choice for you will ultimately be a compromise between price and functionality, versus ease of use.

Summary

Choosing the right technology is really important, but it is not the whole story.

Firstly the software needs to come from a vendor who has the experience and stability to support your business on an ongoing basis, and add real value. Secondly your new CRM system needs to be adopted enthusiastically by everyone in your organisation if the system is to be a success. And finally, never lose sight of the fact that the customer is the reason for your CRM implementation.

The return on your investment needs to be measured in increased sales from customers who believe you are delivering a great customer experience.

About Essential Business Guides

This guide is the fourth in a series of essential guides on how technology can help organisations put customers at the heart of their businesses to generate more leads, make more sales and retain more customers.

- 1. How to make every single person in your business a sales person?** - This advice guide will help owner managers of SMEs put customers at the very heart of your business and show you how technology can help.
- 2. How to turn prospects into leads?** - This advice guide will show all those involved in sales and marketing how to unlock the potential of your database by turning more prospects into leads - by building relationships and lead nurturing, and show you how technology can help.
- 3. How to market your business in a recession?** - This advice guide will help marketing managers in SMEs create an emarketing plan and show you how technology can help.
- 4. Ten things you need to consider when choosing the right sales database or contact management solution for your business.** - This advice guide will help owner managers in SMEs plan wisely when deciding to implement a contact management or CRM strategy and show you how technology can help.

Showcase - ACT! CRM software

ACT! by Sage has been the number 1 selling entry-level CRM solution for over 20 years, and continues to bring the latest, most intuitive technology to businesses across the globe. ACT! has more than 2.8 million individual users in every type of SME in 26 countries.

Because ACT! supports an “anywhere” workforce with seamless online, offline, and mobile access solutions, it works for any business environment. With ACT! you and your team can achieve maximum productivity so you have time to focus your attention on better customer experience.

We understand that each business is unique; therefore we offer a range of CRM applications to suit businesses of all types and requirements.

Our portfolio of market-leading applications consists of:

- ACT! by Sage
- Sage CRM
- Sage SalesLogix

For further
information about ACT!
call **0800 694 0569** or
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About Sage

Sage is a leading supplier of business management software and services to 5.8 million customers worldwide. From small start-ups to larger organisations, we make it easier for companies to manage their finances, people and customers. Our purpose is to help our customers run their businesses more effectively, helping them to gain greater insight into their business activities and providing them with lasting benefits by automating their business processes.

We have global strength and local focus. Our direct coverage in 26 countries and global network of over 30,000 Sage-certified business partners provides unparalleled business software and services expertise.

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'Ten things to consider when evaluating and implementing CRM Solutions for your business' is written by bm-bm, an e-marketing consultancy specialising in generating CRM leads for B2B clients.

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