

# WHAT PEOPLE DON'T TELL YOU ABOUT CRM



# Introduction

We live in a digital age, wherever you look there are Apps to make your life easier, business coaches telling us to systemise our businesses and expectations for businesses to become increasingly more organised and focused.

Our customers and prospects are now more educated on our products and services than ever before.

As a result, our existing customers expect even higher levels of service from us and our potential customers are asking more and more. We need to be able to act quickly and deliver an excellent level of service, Information needs to be easily accessible and we need to be able to act in the right way at the right time, the internet and easy access to information mean people simply no longer have the patience to wait. These are just a few of the reasons that having a Customer Relationship Management system in place is more important than ever before.

If you are reading this guide then you are most likely already thinking about investing in CRM, this may be to replace a system already in place or to implement CRM for the first time.

Either way making the right decision is important, especially when so much is at stake.

This guide is aimed to walk you through the key things to think about and to help you make a clear plan before making a decision to ensure the decision is as stress-free as possible.

Together we will look at the following areas:

- **What is CRM**
- **Clearly identify your requirements**
- **The Selection Process**
- **Implementation**
- **Ongoing support**

# WHAT IS CRM?



When people think of CRM, they often think of this as an Address Book storing information on their customers and prospects, and although this is a part of CRM it is not all that a CRM can do, more the primary focus.

### **A simple breakdown**

A good Customer Relationship Management system should do what it says on the label. It should allow businesses to manage the relationships that they have with their customers.

This should be the primary focus and although the Address Book feature is an important part of this, it is just that – a small part of the bigger picture.

### **Address Book**

This should be able to store basic information on your clients and in some cases your prospects, you should be able to easily update the information and also quickly access it. This should be adaptable and should allow you to store what is important to your individual business needs. This is the part that makes CRM different from using MS Outlook or Google to manage your customers, allowing you to track notes, store emails and documents and view information quickly. It's like a super filing system that allows you to access the information with a single click of the mouse.

### **Sales**

CRM is also a great way to track sales, not only does this give you the ability to have sales cycles, track pipelines and forecasting but, also this enables you to quickly see what products and services your customers have, have had in the past and are looking to purchase. Meaning you can target your marketing efforts and the support you offer.

## **Customer Service**

Customer Relationship Management means both building and maintaining your relationships new and old, so using CRM for customer service means you can track issues, faults, concerns and resolutions. Making your business more engaged with what is happening in each customer experience, enabling you to pull information from all areas of the database to give an accurate and timely resolution to any concern that arises.

## **Notes, Documents and emails**

The ability to quickly add notes and read them is key to the success of CRM usability long term, if this is not easy people will simply not read or update them. Likewise, with documents and emails- not to mention email attachments. It is important to ensure you are happy with how this area looks and feels and equally with where these will be stored, most CRM systems will allow you to store notes, documents and emails at multiple levels within the database and this will make a huge difference with end-user success. Ensure you look at this and that it will work for your business.

## **Reports and Dashboards**

Understanding the capabilities of the database upfront means that you can be confident in the information held and the information you can quickly access.

Think about the current reports your team run, any KPIs in place and ensure the CRM will reduce the time you currently spend weekly or monthly running these reports, remember CRM is about making your day to day business functions easier not harder.



# IDENTIFY YOUR REQUIREMENTS



This checklist is designed to identify some of the key areas to consider when choosing a CRM system and ensure that the decision-making process is not driven by features alone.

## **Business requirements**

Consider the following:

- **What are your business goals?**
- **How are you currently tracking your customers?**
- **What is working well?**
- **What could you be doing better?**
- **What are your customers telling you?**
- **Who is best placed to drive the project?**
- **What are the key drivers for implementing or moving to a new CRM solution?**

Once you have these key points clear you can then begin to think about the system itself and what areas of CRM you will need, this is an important part of the process as some CRM providers are inclusive and others charge per module.

## **Where to start implementation**

Speak to your team managers, head of departments or simply to your team as a whole. Decide if you are going to implement CRM across the whole business or in a single department or workstream. Remember this can be a phased project and you can start with a single focus point and then branch this out to other areas of the business.

It is important to note that if you are an established business or have an established team, some people do not like change and you may need to have a plan for change management in line with your CRM implementation plan to ensure your team give full buy into the new database.

## Process

The first thing that springs to mind for most people when they begin the search for CRM are the features of the system and the process flows. It is important to look at process first, don't worry features are next.

Consider the following:

- **What processes do you currently have in place?**
- **Which team or workflow is a priority?**
- **What information do you need to track?**
- **How important is customisation?**
- **Who is your email provider? – if you want the ability to save emails into the CRM this is important.**
- **Will end-users need to see different information?**
- **What security will you need over the information held?**
- **Will you want to self-manage the database? – Do you want to be able to make changes to fields and access in-house or do you want the provider to offer this as support?**



## Modules and Capabilities

Next, we need to think about the modules and functionality you are looking for, below is a list of the area's most widely covered by CRM providers.

Knowing which are most important to you will help you to decide which system is right for you, scale these from 1- 10 so that you can make allowances or additions if required.

- **Address Book**
- **Lead Management**
- **Sales/ Opportunities**
- **Customer Service Cases**
- **Email Marketing**
- **Templates - Estimates, Quotes, Letters, Emails etc.**
- **Calendar**
- **Notes**
- **Document storage**
- **Email storage**
- **Export capabilities**
- **To-Do lists**
- **Mobile App**
- **Dashboards**
- **Reporting**
- **Notifications and reminders**
- **Action plans**
- **Integration with other software- if so, which other systems need to be able to communicate with your CRM?**

## **Entries**

One of the things that are often overlooked is the way the entries in the CRM relate to your business. Most CRM allows for Company and Contact entries; however, you may work business to consumer and not business to business, do you need to be able to store individuals that are not connected to companies? Another thing to think about is the duplication of data.

Most of us do not want duplicate companies in our databases, but we may want a business with multiple premises or in fact the ability to add multiple contacts with the same name.

For example, if you have an MD called John Smith that runs ABC Contracting, but at XYZ Engineering the finance manager is also called John Smith can you add both to your CRM? Some systems will not allow this and you would need to rename one of the entries John Smith 1 in order to add the entry, this is not a productive way to work and can affect other areas such as merging emails a document. Dear Mr Smith 1 doesn't give off the right impression, and will not be well received by your customer.

This may not seem big now, but getting it right from the start means a reduced chance of having to change CRM systems later.

## **Data Import**

Take into account data import, if you have an existing CRM system or if you are using excel you may need to import your existing data into the new CRM, this will have a cost attached and you will need to ensure availability of both someone at your end collecting the data or back up and then someone internal or at the CRM providers side to import this into the new database.

Ensure you are clear on how much data you need importing and ask how long this will take, remember as soon as this data is exported and passed over for import it cannot be worked on and becomes outdated, keep this process as short as possible for minimal disruption.

# THE SELECTION PROCESS



## **IT Requirements**

It is important to speak to your IT team as soon as possible and identify any barriers. You will need to know if you can download any add-on or applications, as some CRM systems need you to download these as they are not in the product.

Your IT team may also have preferences or policies for hosting the software. Although many businesses are happy to host software in the cloud, many still prefer the ability to host their own systems due to security policies or requirements.

This can in some cases drive the buying decision as not all CRM systems on the market offer self-hosting as an option.

It is equally important to ask for system requirements (if hosting the system on your own server) or that you are happy with the data centre certifications and security (if hosting in the CRM providers data centre) and ensure that your IT team are happy with these before you make a decision.

## **Contract Terms**

Many CRM agreements have contracts attached to them, this may be 12 months 24 months or longer, check you are happy with the terms.

Be clear on if you can both add and reduce users within the agreement during this time to ensure you have the flexibility you need.

## Payment Terms

Look at the payment terms. Some providers will want upfront payment for the whole project others will offer monthly payment terms or a mix on licencing vs services. If you are looking to implement CRM in the next financial year and are simply looking to budget accordingly this is a vital part of the decision-making process and can have an impact on cash flow.

## Demonstrations and Trials

Ensure that you have a demonstration of the CRM systems you are interested in, Some providers will have online videos and demonstrations set up and a simple Google search will show these to you, however, many CRM providers offer a Personalised one to one demonstrations either in person or in most cases via an online screen share session.

These demonstrations are a valuable use of your time as you can ask questions, see parts of the system in detail and can be focused around your requirements.

Likewise, free trials are a great way to ensure you make the right decision.

Follow the below tips to get the most out of a trial system.

- Add some of your own data – of dummy data to see how the system would work for you.
- Ask other members of the team to test the system, get a few opinions.
- Ask the provider a question, the support you get in the trial stage will tell you a lot about the ongoing support you will receive.



## **Long Term**

Some CRM systems offer a free or entry-level product and this can be quite appealing for some businesses, however, it is vital that if you are looking at one of these options you look beyond the initial set up period when making a decision.

In many cases the offering after the initial free or entry-level capabilities are exceeded means you will need to spend more in the long term. A good CRM will have the ability to grow with your business not set constraints.

# IMPLEMENTATION



Having the right implementation plan can make or break a CRM project, having a designated project manager both within your business and from the CRM provider will ensure that dates are met and that the project is kept on track.

### **Have a Plan**

Set clear milestones and ensure that you feel confident and have an open path of communication with the supplier.

You will need to set dates for installation or set up, database changes to include field set up and also any dashboard or report building, any data import that you require and training.

### **Testing and development**

Once the initial implementation is completed and before the system goes live you may want to make changes or complete a testing phase, this is especially important for larger businesses where workflow has been built to ensure that there are no final changes before the users begin to actively use the database.

### **Set a “Go Live Date”**

Make everyone in the business aware of this, prepare the end-users and any other team to allow them to support the transition.

## Training

Different users may require different levels of training, this will depend on the types of users and also their job roles.

Check what is included in the training that is offered, think about the following points

- **What is the current level of knowledge within your business?**
- **Is this training pre-recorded?**
- **Will the training be bespoke to your business?**
- **Are different levels of training available? – Basic and Advanced sessions may be needed.**
- **Do you want to be trained on how to add or change fields, dashboards or reports, will you need to know how to import data?**
- **Do you want online training or face to face training?**
- **Can you access in-product support?**
- **If you want to train your own staff is a train the trainer available**



# ONGOING SUPPORT



One of the things many people forget to prioritise is after the support of the database implementation.

This is such an important part of achieving CRM success. Knowing the level of support, you will receive long term mans you can plan. On average 1 in every 5 users need to have support in order to cover annual leave, people leaving the business etc. however some providers will insist all users are supported and others will only support a group of super users. Check this in advance and ensure it is built into the overall CRM budget.

Another important thing to consider is the locality of the support and the support hours that are offered. Having UK support may be important but equally, so you may require support 24/7 due to your business operational hours.

### **Updates and Upgrades**

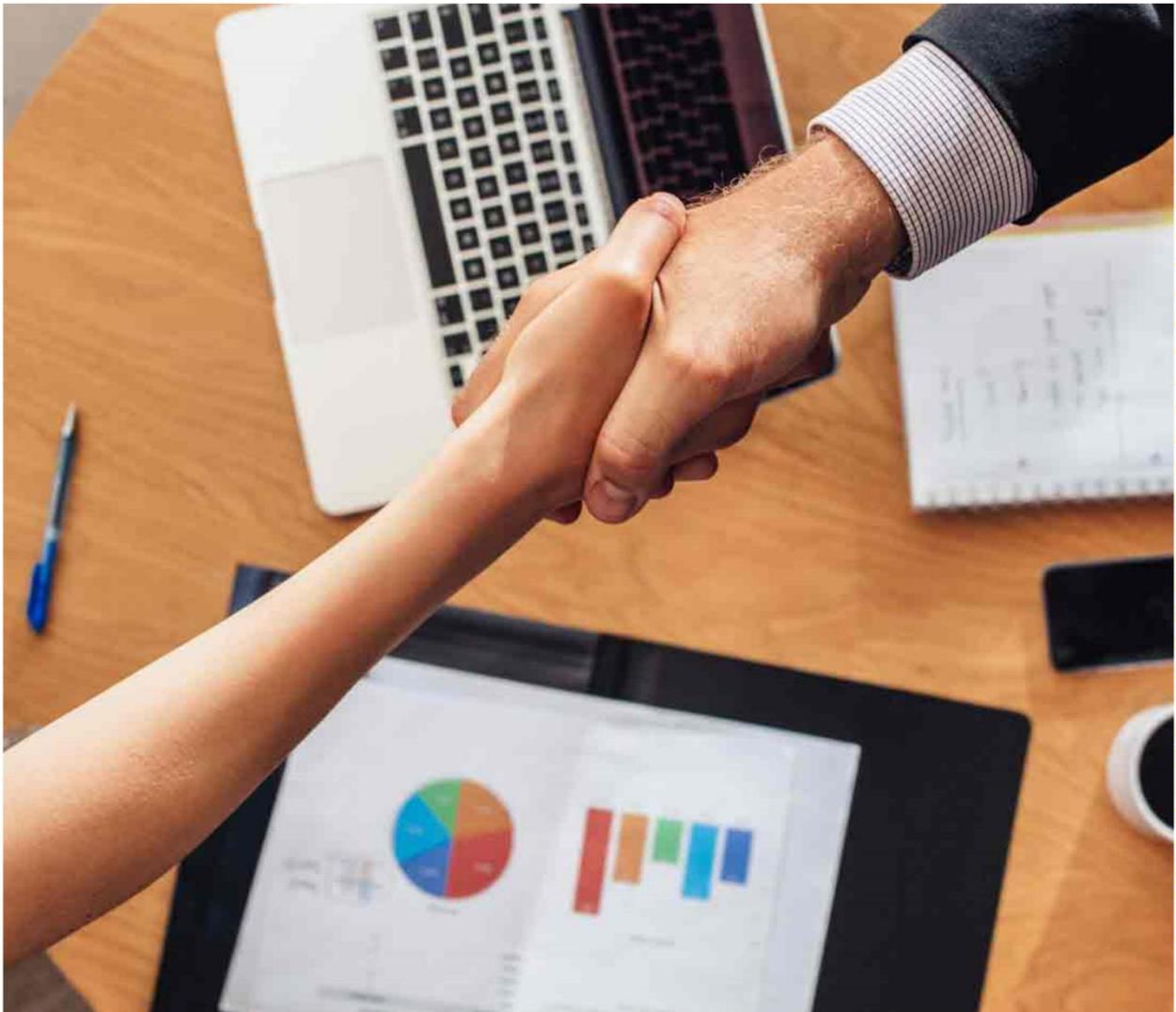
CRM databases held in the supplier's cloud environment will often receive updates on a regular basis, however, if you choose to host your own system you may need to have the CRM system manually upgraded and this could incur additional costs and time with the system offline.

### **Ongoing CRM Success Reviews.**

We have already discussed the importance of ensuring you elect a CRM system that has the ability to grow with your business. Equally, you may need to plan in reviews on an annual or quarterly basis to ensure that your system grows and is developed as you need.

Check if this is included under your support or partnership agreement with the supplier and agree a time frame for reviews in advance, you can always change this if required but you cannot always add this as an option later down the line.

# IN CONCLUSION



When choosing CRM there are many factors to take into account, from clearly setting business goals to identifying your requirements in modules and then in the features available.

CRM is an ongoing project and does not simply end when the system goes live.

Choosing the right provider and the right system is equally as important as ensuring your team are on board and will get the desired results from the system your business implements.

Having a CRM consultant can help, but ultimately the decision sits with the business. Having a clear view in advance will help make this the right decision and save a lot of time later down the line.

Going through this process to ensure you are prepared and have a clear set of requirements will mean that you can clearly and continually evaluate the CRM system and achieve long term success. In line with ensuring you build, maintain and utilise the Relationships with your customer and prospect`s alike to deliver an excellent service to maintain and grow your business.



For more information on CRM and how it can help your business, or to book a consultation  
Contact us at [www.unimaxsolutions.com](http://www.unimaxsolutions.com) email [info@unimaxsolutions.com](mailto:info@unimaxsolutions.com) or call us on 01709 879 192