

# How to Choose a CRM System

**When it comes to Customer Relationship Management (CRM) it's important to understand all the benefits of an integrated system before beginning your selection process. That's why we created this guide – to provide you with the essential information you need to make the best decision possible.**

This guide is designed to help you build a business case for a CRM system, form an effective project team, ask the right questions, identify the challenges involved and much more.

You may be wondering, "Why would a software company like Sage distribute a booklet that doesn't promote its own products?" We know how important it is to have good information before making smart decisions. What's more, we're confident that the more you know about CRM systems the more likely you are to seriously consider - and ultimately choose - Sage's CRM software solutions. In other words, our software stands up to the most stringent selection criteria.

We at Sage look forward to helping you succeed in choosing the CRM solution that's best for your organisation.



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## Understanding CRM

CRM is more than just software or a set of processes – it's a business culture solidly focused on winning and keeping the right customers. A good CRM solution builds value for your business by opening up vital communication channels and creating a common client-focused knowledge-base to better serve your clients.

CRM is about understanding the buying habits and preferences of your customers and prospects so you can:

- Build and strengthen customer relationships to keep them coming back
- Provide value-added services that are difficult for competitors to duplicate
- Improve your product development and service delivery processes
- Increase your staff's awareness of customer needs
- Reduce customer frustration by not asking the same questions over and over.

By effectively integrating your marketing, sales and customer service functions, a good CRM system makes it easier for everyone inside your company to work together and share critical information.

An effective CRM system empowers your customers and prospects to do business with you – the way they choose! Imagine connecting your customers to your employees and business partners across any department, through any process and via any communication device - phone, fax, email, Internet.

CRM can contribute many benefits to your organisation including:

### **New sales opportunities**

A good CRM system will classify your prospects and help identify your best customers. With detailed information on your customers you can accurately project and respond to their buying needs throughout the sales cycle. A good CRM system can help you automate routine sales tasks –

allowing you to spend more time focusing on strategic sales issues.

### **Improved customer service**

The right CRM system allows your team to take a pro-active approach to customer service. With up-to-date and complete customer information at their fingertips, your employees can resolve customer issues more quickly and successfully create cross or up-sell opportunities.

### **Better decision making**

CRM systems provide a single view of the customer across all touch points and channels, as well as delivering comprehensive reports of customer behaviours, marketing campaign results and sales activity. Each of these elements are necessary for smart decision making and long term strategic planning.

### **Greater efficiency**

With an integrated CRM system, you can gain immediate access to your organisation's critical customer information. A good CRM solution also increases internal efficiencies by automating workflow processes, reducing human error, decreasing process time and providing consistency throughout the entire organisation.



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## Getting Started

Most companies require that you justify the need for a new system before you make a purchase. Building a case for CRM provides the necessary background information to help you define the need, justify the cost and demonstrate the value of the investment.

### **Elect a core team**

Establish a core group of individuals dedicated to driving the CRM project to completion. Before planning your strategy and implementation make sure your team includes a project leader and project managers to oversee the functional divisions of your organisation – such as marketing, sales, customer service and technical departments.

### **Set your goals**

Your team should have a shared understanding of your CRM goals. To achieve this, the core group should identify your organisations objectives, focus on processes that require re-engineering and discuss the appropriate courses of action.

Examine your current processes

Analyse your existing business processes from many viewpoints, to find out how they impact both your organisation and your customers. By evaluating your processes now, you can identify what's working and what's not and prepare to implement a new CRM system that emulates the most effective strategies for achieving success.



## Understanding the Core Components of CRM

CRM helps to increase productivity across your marketing, sales and support functions. By understanding the ways CRM can improve your company's effectiveness, you can better communicate those benefits to key decision makers.

### **Marketing Automation**

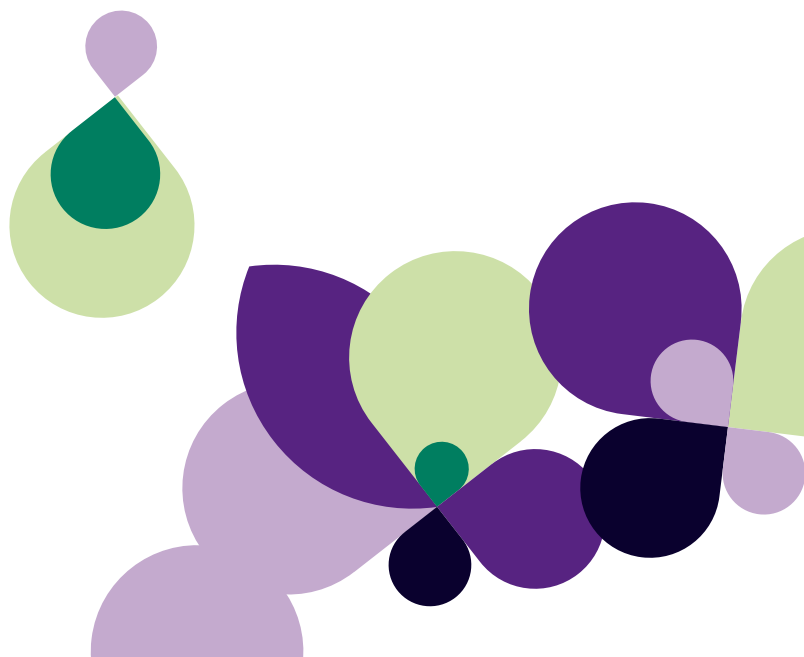
- Develop, target and implement campaigns
- Manage and analyse marketing budgets
- Maintain lists and track responses
- Analyse campaign results

### **Sales Force Automation (SFA)**

- Perform analysis to ensure time and energy are spent on the deals most likely to close
- Improve lead distribution and tracking
- Effectively process quotes and orders
- Provide remote sales staff with instant access to corporate information

### **Customer Service and Support**

- Capture and track every interaction with every customer regardless of touch-point
- View and measure call turn around time and understand what is taking longer to resolve and why
- Maintain a complete case history with instant access to all previous issues and customer interactions
- Automatically escalate cases if not closed within certain time frame



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## Involve the Right People

The decision to choose a specific CRM solution should be delegated to a core team of individuals to serve and represent the functional needs of various departments. This requires full cooperation and collaboration amongst System Users, System Managers, System Integrators, System Customers and System Signoffs.

## Choose a Consultant

Consultants offer specialised expertise in evaluating and implementing CRM solutions. These experts can help your organisation in three important ways.

- Evaluate your needs and suggest the best CRM solution for your specific situation
- Save your company time and money during system install and training
- Help you get the most out of your CRM implementation, based on your organisation's requirements

Some of the best CRM consultants are software resellers. Many resellers offer a range of services, including strategy development, business process management, technology implementation and training.

For larger CRM systems resellers often have the additional consulting support of their software supplier to help manage the complexities of the implementation.

## Narrow the Field

Look for a CRM system that integrates your back office accounting software and other business systems so customer information can be updated in real-time, while being shared and employed effectively across the entire organisation. Be sure that your solutions are robust and versatile enough to:

- Be accessed from any location – from headquarters to remote locations and mobile workers
- Seamlessly integrate with your back office accounting system
- Integrate with a wide range of third party software or other internal systems

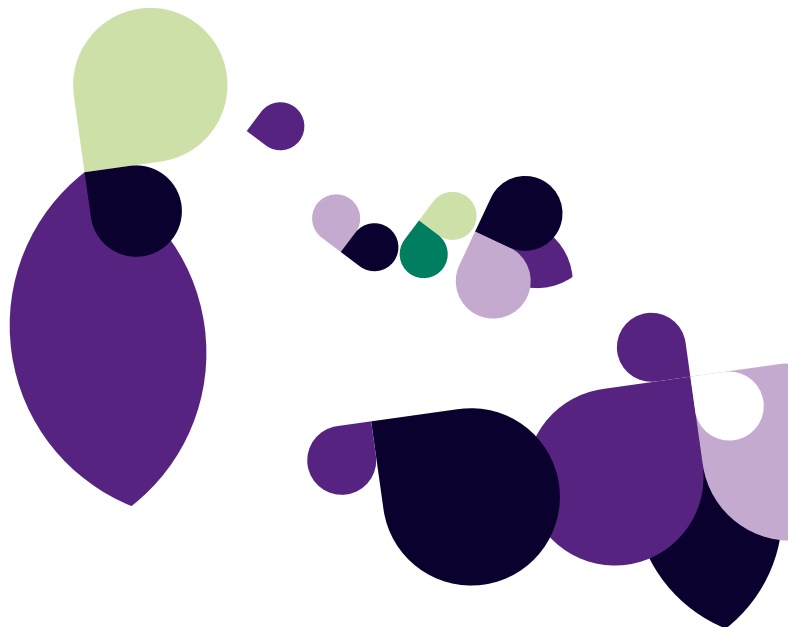
## Increase communication channels

The ideal CRM solution will integrate your multiple business channels and provide your users with seamless remote access to up-to-date customer information. Think about the different interaction points your customers are currently using – and likely to use in the future to communicate with your organisation. A good CRM system will allow you to retrieve real-time information at any time and from anywhere. Choose one that will fit the functional needs of your system users.

## Keep a global perspective

The ability to support a global reach, even if not essential now, is a vital investment in your company's future. When viewing CRM features find out if:

- The company sells and supports products in the countries in which you do business
- The software provides multi-currency support
- The software is available concurrently in languages other than English



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## Consider implementation time

The less upfront customisation your system requires the more quickly the implementation process can be completed. Ask your reseller how long the implementation will take and what factors may increase or decrease the amount of time needed

## Select a System That's Right for You

Now that you've evaluated a number of possible solutions, it's time to make a decision. Consider the following when selecting a software vendor:

### Interview the resellers before the demo

Familiarise yourself with the various CRM solutions available on the market so you can be confident about your top picks when you short list the best options for your company. By interviewing as many software resellers as possible in advance you can avoid time wasted by sitting through lengthy, irrelevant demonstrations.

Pick the best three systems and ask each reseller to provide the following information:

- Estimated licence cost for your implementation
- Estimated build-out costs to adapt the system to your requirements

- Timeframe for implementation
- Annual support and maintenance costs
- Training methodology and training costs
- A plan for integrating your back office-systems as required

### Insist on user friendly software

If your system is not user friendly, your staff won't be able to maximise the full benefits. Make sure you select a solution that's logical and easy to use.

Ask the reseller these questions:

- How easy to use is the software interface?
- Can the interface be modified to more closely match the needs of my organisation?
- How easy is it to navigate between modules of the software?
- What type of software documentation and training will be provided?

## Top 10 features to look for in a CRM system

1. Sales cycle analysis.
2. Integration to your back office accounting system.
3. Open, industry-standard technology.
4. Seamless flow of information between corporate systems and remote employees.
5. Real-time reporting and analysis.
6. Automated workflow.
7. Contact and campaign management.
8. Multiple language and multi-currency capabilities.
9. Ability to easily customise your solution to fit your business needs.
10. Scalability to accommodate future business growth.

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## Evaluate their technical support

You may need to rely on the software vendor's technical support team, here are some questions to ask regarding the vendors support team:

- How quickly do they take calls from customers?
- What are their hours of operation?
- What options are available for after hours queries?
- What charges or service plans are involved?

## Inquire about their customer service department

Look for a company that is dedicated to regularly providing high quality service to customers and has the resources to deal with product questions, customer feedback, order tracking and software registration.

## Get flexible reporting

Look for a solution that has the capability to produce the reports your organisation requires. Find out if customised reports can be created with a minimum of time and effort. See if the system will allow you to manipulate the data any way you choose.

## Ask about customisability

Does the software allow you to modify all aspects of the system? Do you have the ability to create and modify fields, screens, tables, views, scripts and security settings on the fly?

## Ensure options for growth

A good software company invests heavily in engineering and develops new product features and enhancements regularly. The opportunity to move to a similar but more powerful product can give your company flexibility as it grows.

## Does it fit your budget?

If your first choice costs more than you can afford, reprioritise your list of requirements and compare them with the features of applications that do fall within your budget range. Then determine which features or modules are essential for the success of the project.

## Justify the investment

Once you have decided which product you wish to purchase it may be helpful to create a document or presentation to explain your choice. This document needs to clearly detail the features of the system, the direct fiscal benefits of these features and the resulting long term benefit to the company. It should also outline the total cost for initial implementation, training and ongoing maintenance.



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## Implementing Your System

What is the best way to make the implementation process a smooth and successful one?

Consider the following guidelines:

### Create a blueprint

To smooth the implementation process create a 'blueprint' of your CRM related business processes with your consultant or software reseller. This document gives the team a pre-determined plan and a set of guidelines to reach your CRM goals.

### Prepare for modifications

One of the most common mistakes companies make is trying too hard to limit modifications to the selected packaged software. If you need software that can meet the unique requirements of your business be prepared to make modifications after installing the "out of the box" solution.

### Provide good training

Good training is essential and provides the information, practice and involvement needed for your staff to get the most out of the software.

### Test before launch

When it comes to something as valuable as your customer data, you will want to beta test every system component and make certain its functioning properly before taking the system live. Enter mock customer data and see how well the system receives and processes the information.

### Plan for ongoing evaluation

Keep in mind that your CRM system will always be evolving. As a result implementation never completely stops. Ongoing evaluation of your business processes will help you maximise the benefits CRM can bring to your organisation.



## 8 Helpful Hints for Promoting CRM as a Business Culture

1. Build a case for change. Think about the impact of CRM strategy on people – the benefits and consequences of changing or not changing.
2. Hold regular meetings across all departments to communicate project progress.
3. Keep employees in the loop by providing information and clarity about what is happening.
4. Encourage employees to speak up about changes and listen to what they have to say.
5. Give employees time to make the transition and adjust to the new approach.
6. Support the managers who are leading the CRM march.
7. Understand that effective implementation of CRM is a cultural process; it will take time for everyone to adjust to new ways of doing business.
8. Inform customers about the company's vision for a customer centric organisation.

# About Sage and CRM

**Sage provides CRM solutions to mid sized enterprises. With 16 years experience in the development of products that provide businesses with the ability to manage and report on all customer centred activity. There are over four million users of our CRM solutions, which can either stand alone or be fully integrated into existing systems, to give a single view of all customer and contact activity.**

## ACT! by Sage 2009

A simple but powerful contact management system, ACT! by Sage 2009 centralises your contact information, organises your diary, and tracks sales leads. Easy to set up and use it has all the features needed to get your sales and marketing in order - organising you, your contacts and your business.

## Sage CRM

Sage CRM is an easy to use, fast to deploy, feature rich, low cost of ownership CRM solution designed to introduce the real benefits of CRM from small to medium-sized companies. Offering a choice of deployment, either on your premise or on demand (SageCRM.com), to meet your infrastructure needs. Sage CRM aggregates individual and group efforts across sales, marketing and support teams making people and companies more efficient allowing you to get ahead of the competition. Sage CRM delivers the tools entirely through a browser to take advantage of the huge efficiencies that the Internet offers in delivering business applications. Sage CRM is also available as the CRM module in two of our business management suites, Sage 200 and Sage 1000, for true end-to-end business processes maximizing your investment in CRM.

## Sage SalesLogix

Sage SalesLogix is the Customer Relationship Management solution that enables small to medium-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximising customer satisfaction and loyalty. Designed to meet the distinct needs of small to medium-sized businesses, Sage SalesLogix delivers integrated Sales, Marketing, Customer Service and Support automation solutions that adapt to your unique customer acquisition, retention and development processes. Sage SalesLogix provides a complete CRM solution with low cost of ownership, rapid time to productivity and high return on investment. Flexible and easy to use, Sage SalesLogix readily accommodates growth and changing business requirements. SalesLogix, the SMB CRM leader with more than 8,00 customers worldwide, is part of the Sage family of integrated business management solutions.



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