



CRM Software Selection:

Ensuring cost effective configuration and high end adoption rates

Selecting the right customer relationship management (CRM) solution for your business can prove tricky. The good news is, the market is fairly mature, with a number of viable choices. The challenge is in understanding the differences among the various solutions.

On the surface, all CRM solutions may appear similar. But with CRM selection, as with many things, the devil is in the details. Fortunately, the differences quickly emerge if you know where to look.



Configuration

Whatever CRM solution you choose, it will need to be tailored to your specific business. This reality can be a good thing if the solution allows modifications to be made without additional coding. But be forewarned: Though developers and vendors make bold claims in the area of configuration, the chasm between rudimentary and advanced capabilities is deep and wide and has significant expense implications.

Automation

Business process automation is a primary driver of many CRM implementations. Large or small, a business can often dramatically increase efficiency and reduce costs through process automation.

While most CRM solutions offer some automation of basic repetitive tasks, others take process automation to a more sophisticated level through workflow wizards. The right level will depend on the complexity of your business. The key here is selecting a solution flexible enough to accommodate your processes rather than forcing you to make wholesale procedural changes to fit the solution.

Integration

Customer relationship management has developed from sales force automation to include a wide range of applications, such as marketing automation, opportunity and pipeline management, and customer service and support.

Beyond integration across its application suite, you'll also want to determine the effort and expense required for the solution to integrate with external data sources and external business processes.



Interaction

Last, but certainly not least, is managing customer interactions across multiple communication channels. Sophisticated consumers expect a smooth communication experience, whether by phone, web or email. Most CRM solutions provide some level of email communication and Web self-service. Only a handful include phone capabilities.

In today's hyper-competitive world, your ability to provide superior customer service across every channel can set you apart, so interaction management capabilities should not be overlooked.

CRM is not just a technology; it's a holistic tool that serves your customer philosophy. The CRM solution you choose will have broad implications for your business because it touches so many people both internally and externally.

Ensuring High Adoption Rates With Cost-Effective Configuration

To what degree is your business dynamic? Do you have new competitors entering your market, nipping at your heels? Do you plan to introduce new products or services to maintain your leadership or to leapfrog the competition? What about market expansion? Do your growth plans include new market segments? New geographies? New sales channels?

If you are like most companies considering a CRM solution, your answers to these questions are a resounding "Yes!" Growing, evolving, and even reinventing your business is a never-ending journey. In all industries, the one constant is change.

These days, the rate of change seems to be the speed of light, with no sign of slowdown any time soon. Obviously, you want a CRM solution designed to harness this rate of change.

Configuration Versus Customisation

Whichever CRM solution you choose, some effort will be required to tailor it to your specific business. The trick here is to determine how easily and how deeply you can modify the CRM implementation to reflect the nuances of your business without coding. These type of changes typically fall under the category of development. Once coding is required, you're getting into customisation, which is where CRM implementation costs can spiral out of control.

Time Is Money

With configuration, a user without a heavy IT background can quickly implement and tune changes based on user feedback, through various built-in wizards, tools, and configuration options.

However more advanced customisation, with the difficult coding involved, calls for a skilled programmer. The coding alone is time consuming, and the process becomes even lengthier, because before the changes can be rolled out to users, the new code must be tested.

If your IT staff is overburdened by other projects, you'll have to wait in line for your changes. By the time the coded changes are ready, your business requirements or market conditions may well have changed, rendering the coded modification obsolete.

Overleaf are four insider tips on how to differentiate among the configuration capabilities of CRM solutions.



One Size Does Not Fit All

At the most rudimentary level, the CRM solution should allow you to add or edit fields with a point-and-click drag-and-drop interface, so they reflect your specific business model. This facilitates CRM system adoption and improves productivity across marketing, sales, and service teams.

As your business evolves, this simple click-to-configure interface will ensure that the CRM system stays relevant to your business, because the people nearest to the business processes are empowered to make the modifications. Choose a CRM solution that allows mere mortals, not programmers, to make these changes.

Getting Personal

Going a level deeper, the CRM solution should enable users to create a personally relevant system. The solution should be intelligent enough to present only information relevant to the role or function the user is currently performing, rather than forcing the user to wade through irrelevant fields or screens.

For example, when a sales user and a sales manager access the account screen, they will see information tailored to their specific roles. The sales user may have quick actions such as "create a contact," or "create an opportunity" pinned to his personalised navigation bar. The sales manager, perhaps not interested in individual contacts within an account but needing an understanding of the account's overall revenue potential, may have "export forecast," or "export opportunities over a certain revenue value" as quick actions pinned to her personalised navigation bar.

Additionally, the configuration capabilities of the system should be so drop-dead simple that any user can create a personalised visual dashboard. Solutions that give users control over the way they view information have a much higher success rate than those that lock users into the CRM vendor's limitations. Again, this level of configuration should be accomplishable through an intuitive click-to-configure interface.

Data Rich, Knowledge Poor

Many CRM solutions promise a 360° view of your customer. If the applications comprising the CRM solution - marketing automation, sales management, and service and support - are integrated, you are closer to realising that promise. Centralising customer data is the first step. The key is transforming data into information, and more importantly, action-oriented knowledge.

The degree to which your CRM solution can provide the promised 360° customer view is directly related to the power and flexibility of its reporting and analytics, which require more advanced configuration capabilities than are available in many CRM solutions.

Most solutions offer standard reports or simple report-building wizards, a good starting point to understanding your customers. But when you want to identify business trends you'll need something more sophisticated, albeit still simple. More advanced CRM solutions allow you to visually drag-and-drop report fields to create dynamic views of information. If the information can be represented in drill-down dashboard formats, even better.

For example, a sales manager may want to expand his foothold in the North East and plans to host a seminar for a vertical market in Leeds. Action-oriented analytic capabilities allow him to quickly generate a dashboard view of all the accounts in Leeds, by industry, to determine which vertical market has the deepest penetration of existing customers and which new vertical may be ripe for the picking.



The ability to transform data into action-oriented knowledge is one of the most powerful potentials of CRM but it's often the most overlooked criteria in CRM selection. Extra effort in scrutinizing CRM capabilities during your selection process will richly reward you in the long run.

Beyond Accounts and Contacts

At the most advanced end of the configuration spectrum is the ability to create and define unique business relationships beyond accounts and contacts. As we've covered, most solutions offer traditional account-centric or contact-centric relationships and allow you to add or edit fields to reflect your business model.

But if you are like most businesses, you are selling a service or product with unique attributes and may find it beneficial to create a product-centric relationship model, linking to your account and contact relationships. You can then, for example, track customer purchases and mine that information to identify product trends, such as repair issues, or up-sell and cross-sell opportunities, across a financial services portfolio.

Most, but not all, CRM solutions will require coding to customise this new product-centric relationship. If your business is dynamic, this is where implementation costs can skyrocket. Look for a solution that allows you to create unique business relationships, usually through a simple wizard, with a click-to-configure interface. This advanced level of configuration ensures that your CRM implementation remains relevant to your changing business requirements, without breaking the bank.

We hope you found this guide beneficial. As accredited consultants for the leading Microsoft Dynamics CRM and Sage ACT! applications, Preact provide a vendor-neutral view of the CRM market. We offer help with all aspects of new implementations from product selection to installation, user training & technical help. To discuss your CRM needs call us on 0800 381 1000.



ABOUT PRACT CRM

Preact is an independent Customer Relationship Management (CRM) consultancy working with businesses in the private sector as well as charities and educational organisations.

As multiple award winning CRM architects, we've been helping businesses achieve success from their CRM strategy since 1993. Our experienced team combine strong consultative skills with professional implementation skills and a commitment to customer service excellence.

By working with Sage ACT! and Microsoft Dynamics CRM we offer vendor-neutral advice to help organisations select the most effective solution for their unique requirements.

OUR APPROACH

We take a product agnostic approach to pre-sales to help you choose a CRM solution that will meet your immediate requirements and support business growth. Our consultants will discuss your plans in detail and help you test our recommendations.

Our efforts are focused on developing long term business relationships and we're committed to an on-going evaluation of our performance. We actively seek client feedback to ensure we're delivering on our brand promise of exceeding customer expectations. We were proud to receive the 2011 Sage Circle of Excellence award in recognition of the quality of our service based on independently collected feedback.

All of our implementation team hold the highest accreditations, including Microsoft CRM Implementation, Customisation and Developer Certifications, Microsoft Surestep Project Management, Prince2 accreditations & Scribe Certification ensuring that every requirement is expertly managed at each stage.

We offer a full range of pre-sales, technical consultancy, training and support services to cover every step of your CRM project.

Our recent projects have included implementations for John Lewis Plc, Toshiba Air Conditioning, East Berkshire College, Scottish & Southern Energy, Cranfield University & Europe's largest ACT! implementation for Oxford Instruments Plc.