



How to Look for a CRM Without Losing Your Mind



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I'm going to let you in on a secret. Looking for a customer relationship management (CRM) platform is a fast track to insanity.

That is not an exaggeration.

If Dante wrote a sequel to *Inferno*, shopping for a CRM would rank up there as a modern circle of Hell.

The problem is overwhelm.

There are dozens, maybe even hundreds, of options with more bells and whistles to solve sales and marketing problems you didn't even know existed.

It doesn't matter whether you are working with a budget of \$0 or \$10,000, there are so many choices you can spend entire days descending deeper and deeper into a bottomless pit of platforms that sort of do what you need, but don't come close enough.

Today, we're going to look at a few tips to help you narrow your focus and keep your search manageable.

1. Start by knowing what you need

It may seem obvious, but having a list of must-haves and wish-list features will help you eliminate a lot of *cool looking* platforms that don't meet your needs.

Think about your sales and marketing processes.

What tools do you need to set up and manage your marketing campaigns?

- Automated workflows
- A/B Testing
- Targeted campaigns
- Reporting
- Follow-up

The right CRM will help you organize and manage all these tasks.

What about sales? Every company has their own sales workflow and the CRM that is right for your competitor may not be a good fit for you.

- Opportunity & lead tracking
- Contact & activity logs
- Quotes & estimates
- Contracts
- Account management

Think about how these things work together and fit your internal systems.

2. Think about future needs

Once you wrap your head around what you need today, consider what you may need in the future.

Configuring and using a CRM is a major time investment. You don't have to worry about fantasy scenarios where you land a whale who bankrolls a major expansion, but you should think about your current business goals.

- Do you plan on hiring 5 new salespeople in the next year?
- Will you need a CRM that can help with project management?
- Do you expect to add help desk or customer support functions?

A basic CRM will help you manage a typical sales funnel and customer interactions, but if you know you will need a more robust system within the next 3 to 5 years, look at CRMs that can scale to meet your expected needs.

3. Avoid complex systems with steep learning curves

Any new tool is going to require a certain amount of adjustment and training, but a CRM is supposed to simplify your processes, not make them harder.

If the CRM you're looking at requires you to redesign your entire sales or marketing process, it's not the right one for you.

4. It shouldn't take a dream team from Apple, Microsoft, and Google to figure out how to do basic customizations

With so many choices, you're going to find several CRMs that meet most of your needs out of the box. The problem is that no platform is going to be a 100% match, which means you may have to do some customizations to get everything you want.

Some platforms anticipate common things like modifying templates, creating custom modules, or branding skins and build the tools to do it right into the interface. Others are a little more challenging.

It's common for enterprise type platforms to write directions for IT people rather than front-end users. Unless you understand tech-speak and have a comfortable familiarity with basic server-side coding languages, you won't be able to make changes.

Even customer-friendly cloud platforms can throw in an occasional monkey wrench.

One of the CRMs I looked at did everything I needed and almost everything I wanted. At least I thought it did until I tried to find directions to add custom fields to contacts.

It should have been a simple task, but the instructions and accompanying screenshots were for an earlier version of the platform.

The new interface looked nothing like the one in the picture and the admin function I needed to access was nowhere in sight.

I wish I could say it was a one-off, but I found similar issues with several of the CRMs I looked at.

My best suggestion is to save yourself a major headache and check out the help docs before you sign up for a CRM.

5. Cost. (The real cost vs. the monthly/annual fee)

It's easy to get sucked into a system that has a low price only to discover that it also has rigid limitations.

Depending on the platform, a bargain-priced CRM could limit things like the number of contacts, collaborators, or add-ons. It may not be an issue if you know you'll never need more than 250 contacts or you have no interest in connecting your sales calendar to Google Calendar, but it could become costly and frustrating if you have to choose between important features or pay an unexpected fee if you exceed your plan's limits.

The take away is the need for preparation. Shopping for a CRM can be an overwhelming experience. There are so many companies offering a dizzying array of features for almost every budget. I can't promise these tips will help you avoid shiny object syndrome, but they will help you organize your needs and priorities, which should help when it comes time to decide.

Categories: customer relationships, marketing, succeed, crm