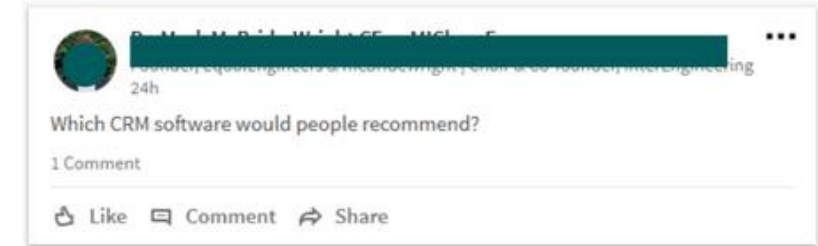


Selecting the perfect CRM system

Guidance and templates to help you select a CRM system that will benefit your business and help you grow.

Fit for YOUR business

Looking for a new CRM system? You're not alone.



Social media has made it easy to ask your network of contacts for recommendations...

... but although responses may be helpful, the answers you get won't take your specific business processes into account.

It's like asking if anyone can recommend a family car.



Every family wants and needs something different.

Knowing what you need

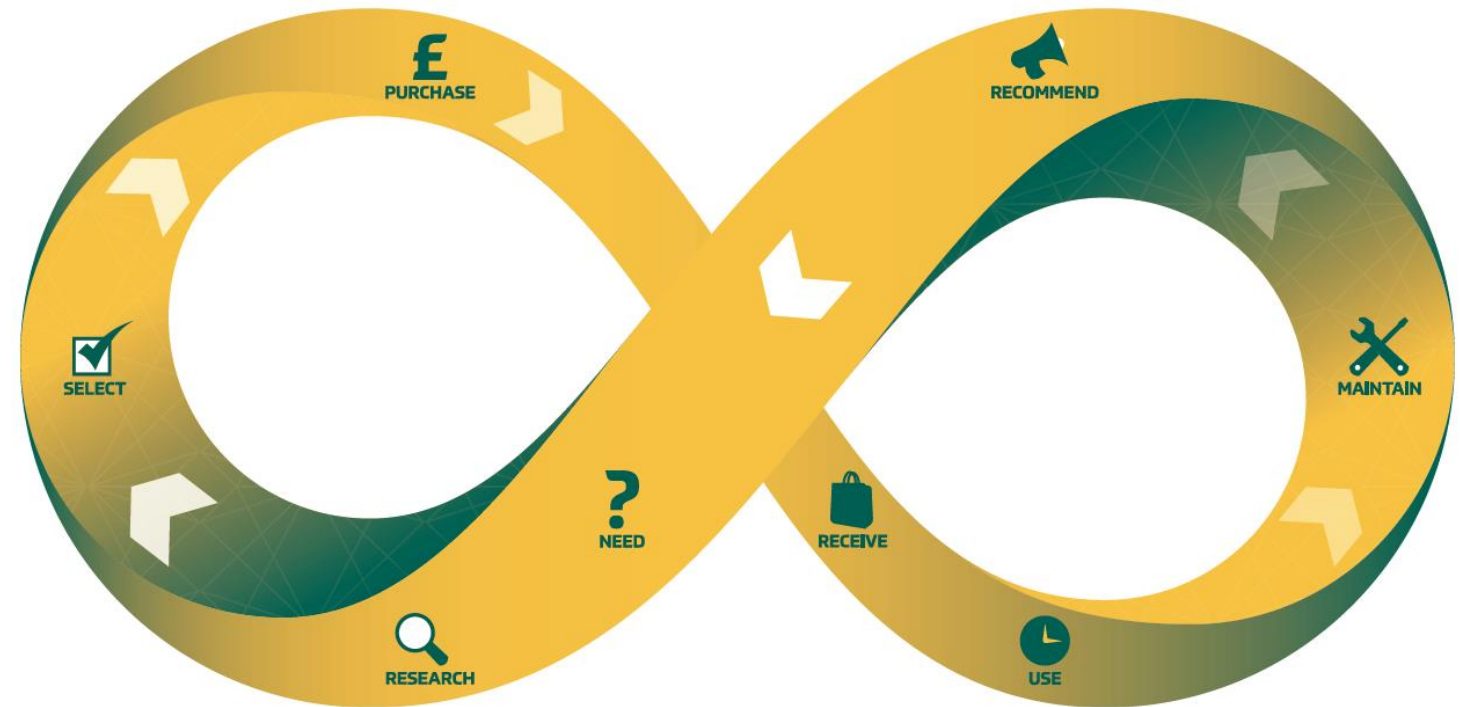
- What are you looking to gain from a CRM system?
- What are the process steps you need to support?
- What tasks do you want to perform on the system?
- What reports do you want the system to produce?
- What data and information do you need to collect?
- Who will use the system, and where (on-site or remote)?
- Does the system need to share data with other systems?

Templates to help

- The following slides will provide you with templates and guidance as you work through the key steps to identifying your needs...and a CRM system that fits.
- Use these to also justify your investment
- What you produce from this will also be useful for your chosen CRM system provider, when setting the system up for you.

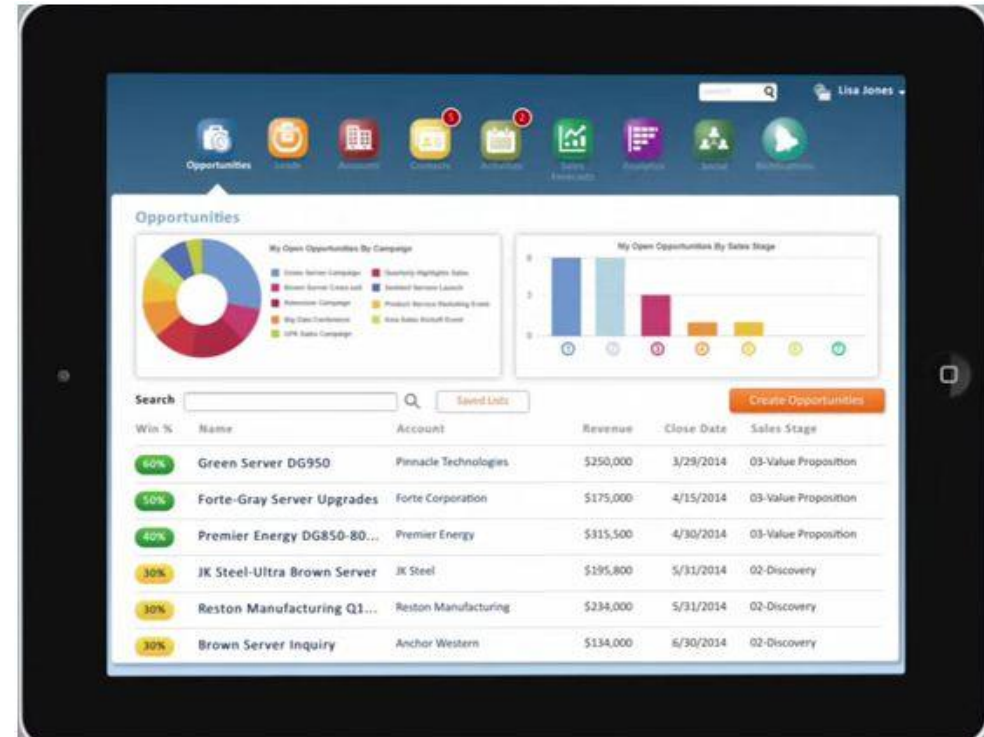
Processes - Customer Journey Mapping

- Map your Customer Journey to design the ideal process your CRM needs to support.
 - External and internal interactions
 - Communications at each stage
 - Identify actions to be automated
 - Reporting and insight
 - Review departmental links



Reporting requirements

- A CRM system should help you run your business.
- Reports and dashboards will give you instant insight into marketing, sales and customer management Key Performance Indicators (KPIs).



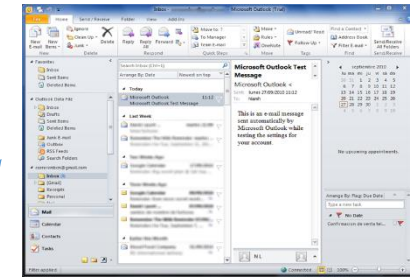
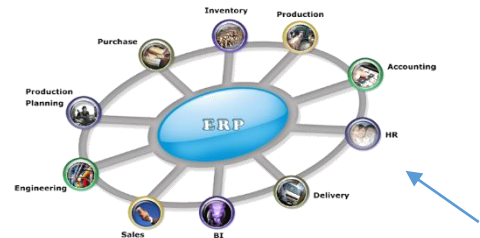
User locations

- Where will the CRM system users be based?
 - Office based
 - Mobile workers
 - Remote with no internet/mobile connection



Sharing data with other systems

- Efficiencies can be gained by linking your CRM system with other systems in your business.
- Work out the benefits of automating the sharing of data between:
 - Finance systems
 - Telephony
 - ERP



Which features to include. The benefits.

- Customer Journey mapping will help identify the system features you need.
- Identify what benefit each feature will provide, so you can choose a CRM system that meets your highest priorities.
- This analysis will also help to justify your investment.

Feature	The benefit
Cross sell opportunity notification	30% increase in sales leads
Live sales pipeline reporting	9 hours resource saving per week
Lead scoring	Higher quality sales leads

Prioritise features

- Based on your requirements, prioritise the features you need in a CRM system.
- This will be used to evaluate potential systems.
- A prioritised list can also be used to phase the introduction of new process steps, which you identify in the Customer Journey mapping.

Priority	Phase	Feature	Expected Benefit
1	1		
2			
3			
4			
5	2		
6			
7	3		

Shortlist and evaluate options

- List CRM system feature requirements in priority order.
- Research, evaluate and score possible CRM systems against your feature list.
- Calculate CRM system costs:
 - User price
 - Set-up costs
 - Training
 - Integration to other systems
 - Ongoing support
- Select most appropriate system to trial.

CRM System Scores
(1 = doesn't meet need well, 3 = meets need very well)

System Features	Feature Priority	CRM System 1	CRM System 2	CRM System 3
Overall Score				
CRM pricing (X users) per mnth				
CRM set-up/dev				
Integration				
CRM ongoing support per mnth				
Expected 12 month cost				

Demos and trials of CRM systems

- Always make sure you get a demonstration of potential CRM systems
 - In line with your business processes
- Consider taking a 30-60 day trial
 - Trial with people that will use the CRM system when chosen