How to Conduct CRM Research

The research to select your CRM is just as important as how you intend to use the software over time. You need to carefully conduct your research so that you select the most appropriate solution for your needs. Follow the process below to get the most out of your research and the CRM you select.

**Determine Your Needs**

This might begin with a needs analysis targeted to helping you narrow down your search. Before beginning the hunt for the perfect solution for your company, you have to know what your main concerns are. Do you desire more data of a particular type? Is there a gap with customer relations that you are hoping to improve? You might be dealing with a lack of organization or a need for automation to manage follow-ups. Implementing these effectively can create better interaction between you and your customer. If your current system of trying to manage these aspects is not working, it’s time to specifically pinpoint the features you have to have in a solution.

By knowing exactly what you are looking for, you can narrow down your CRM research from the outset. This allows you to focus specifically on the CRM solutions that are most aligned with your business model.

**Begin the Research Process**

If you started at this step before narrowing down your options and needs, it’s very easy to become overwhelmed and feel as though you don’t know where to start. There are many different possible solutions out there, but you can get weighed down by all the options if you don’t know exactly how your company intends to use the software.

Once you have already targeted your needs, you can hit the Internet for start your research. With such a high volume of information out there, you need to start a comparison of a handful of options to narrow the field even further. Don’t select any more than 3 or 4 CRMs to look at, because, as mentioned above, you’ll find yourself overwhelmed and wanting to bail on the entire project. You want to consider not only your needs but the budget involved in working with the chosen application and the amount of time you’d have to spend learning the ins and outs of it- also known as the learning curve.

In doing your research, you want to know not only what the provider is telling you but what other people are saying. Is the product easy to use? How often is it updated? Is free training provided? Are there varying levels of service and support to help you know when to upgrade? These are all important questions to consider in your quest.

**Choose the Best Match**

The second step should have helped you eliminate one or two of the options. Bear in mind that in this important selections stage, you need to know that the most expensive one is not necessarily the best. You might end up paying for features you’ll never use- this is again where your needs analysis from the first step is so vital for pairing your with the right solution.