Three Questions to Ask Before Choosing a CRM

Before you make the all-important decision about the system you’re going to use going forward, it’s smart to ask these key questions. Make sure you’ve done your research in advance. When you’ve determined your needs, there’s a better chance that one CRM will emerge as the clear winner for your business.

What Processes and Tasks Need Managed?

This is certainly your first step in selecting a CRM. Typically when CRM solutions are considered, there’s a lot of automation about certain tasks that must be handled, like generating reports and e-mailing customers. You may not need all the functionality that one particular is offering, but as your business grows, an all-encompassing solution allows you to grow, too.

Keep in mind what systems you want the CRM to manage, from organizing events to keeping track of various projects and other job-related information. Make a list of all these processes and then compare it with what the various CRMs are offering. Make sure that all of the key processes are included. Making your wish list might mean that you feel a little overwhelmed about all the things you need handled, but remember that it is a wishlist. There’s nothing wrong with outlining all the possible tasks you’d like a CRM to handle. Make sure you can specifically pinpoint which of these functions can be managed by the CRMs you’re looking at. This is a great process for narrowing down your search.

The Server or the Cloud?

In the past, many CRM solutions were handled directly on the servers for the individual company so that information could be protected from being deleted or lost. These days, it’s far more common for a CRM to offer an integral and comprehensive solution. This often includes keeping the data on the cloud so that you can be sure to access the information no matter where you are. Having backups is also an essential part of having a robust system for your regular use.

Is This Going to Enhance Customer Relationships?

CRM solutions go way beyond providing a lot of data- instead, they are the key to understanding your current customer relationships. They can even be valuable with attempt to forecast how clients will deal with the company. This question will help you visualize the way that a CRM system could make life easier by keeping track of relationships you already have with your customers.

Knowing the breakdowns or successes with current customers is a good first step, because it can help point you in the right direction towards a CRM system. Know that it takes some time for the system to be up and running in a way that benefits you completely.

Get these three questions answered before you engage with a new CRM system. This increases the chances that you will make the right decision with your selection and that you can begin seeing the benefits of having such a system in place very quickly.