

# 10 Things to Ask for When Buying a CRM Tool



A Customer Relationship Management (CRM) software tool should provide you with an organised approach for developing, managing, and maintaining relationships with your customers leading to better engagement, relationships and profitability.

A CRM tool must alleviate the pain points of your sales rep and help to win deals, it is not just for managers to monitor their team's activity. It should provide simplicity, security and scalability of customer interactions.

Here are our top ten things we think you need to look for:

**1 – Top 10 Features** – Consider what specific features your business need. Here we have listed some core features you should expect and ask for:

- **Contact management** – must be able to store contact information (name, address number, social media accounts etc) – these must be able to sync easily from your phone, email, calendar, and ability to share with team members, ability to easily import and export data
- **Interaction Tracking** – track calls, emails, notes, documents, history with each contact/customer and again the ability to share with team members
- **Document Management** – ability to collect upload, store, share documents in a central location to share with team members
- **Accessibility** – ability for sales reps to use on any device, smartphone, tablet, laptop for ease of access
- **Workflow automations** – must be able to automate any repetitive tasks by creating workflows, find out if this capability is core or an upgrade feature

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- **Pipeline management** – ability to see your entire sales pipeline, its status and progress in the sales funnel
- **Forecasting** – ability to improve your predictability for future sales or project revenues based on past and current data and trends, allowing you to improve your sales methods and gain more qualified leads
- **Reporting** – most will have some reporting, however, ensure you can drill down into the data to make it useful for you, ie: geographical, by sales rep, funnel stage – again find out if this is an upgrade feature
- **Ease of use** – if intuitive and easy to use, the adoption rate is likely to be higher, including easy, intuitive onboarding of new team members
- **Scalability** – will this tool be able to grow with you as you grow, or will you need to move to another tool as you grow?

**2 – Multiple Users** – the CRM tool should allow multiple users at any one time and sharing of information between the teams.

**3 – Ongoing Support** – ensure you get ongoing support for your tool and configuration. Should be able to access via email, phone, or live chat, if hosted they should have an availability SLA

**4 – Security** – ensuring the security of yours and your customers data is of the utmost importance from hacking etc – ensure all sensitive data is encrypted competently – losing sensitive information will mean losing the trust of your customer

**5 – Cloud vs On Premise** – with a cloud version you don't need a server or technical expertise on your side – all the info resides on the vendors server – with on prem you own the software, and it is physically hosted by you on your hardware – you have direct access to the servers and no recurring subscription charges, but will mean higher upfront costs

**6 – Integration** - make sure the CRM system integrates with your website, phone, email accounts, calendar, scheduling systems and other required apps etc

**7 – Due Diligence** – ensure company Stability and reputation, choose an industry specific vendor with local customers, this will ensure you have less customisations to do, ensure you get references, and conduct due diligence and understand the adoption rate. Request a demo and test drive a free trial.

**8 - Total cost of ownership** – weigh up the cost of the tool and associated costs to your company including – implementation, time required to update and maintain. Setup should be fast and simple, no extensive training, no admin person required to run it and no manual entry



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**9 – Ownership of Data** – if the software and data is being hosted in a cloud environment the ownership of data becomes more important, you should own the data. Ask the vendor if they will have access to your customers data, and what happens when you leave the subscription, who will retain data.

**10 - GDPR compliant** – there are some laws around data privacy and the tool needs to support that. The customers data and where it is stored and who can access it is very important