Setting up for CRM success the second time around

Changing CRM systems is not for the faint hearted. If you are facing this decision, you have already been through pain. You need to be confident that if you start again with a new CRM, you won't go through pain again.

Loaded has over ten years' experience designing, implementing and supporting CRMs for clients of all sizes, around Australia. We've seen it all! We've distilled here the main reasons organisations decide to change CRM, and how to ensure that the journey this time around is a positive one.

How to avoid challenges next time...

Main reasons for changing a CRM...

CRM is difficult to use, or it's not used at all.

CRM data is unreliable or inaccurate.

CRM program is costing too much.

Choose a product that is rated highly by users for its ease of use. This is one of the reasons Loaded recommends SugarCRM – it is consistently rated by users as the best CRM for reliability, satisfaction and likelihood to recommend.

Invest in supporting users on the CRM journey – engage them in the CRM project itself, put change management at the centre of the project design, and ensure the right communication and training programs are in place.

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Choose an implementation partner experienced in data migration and with quality CRM solution design skills. Poor data quality can stem from a number of root causes, and the right implementation partner can ensure you avoid many of them.

Choose a CRM vendor that offers a transparent, predictable pricing model - This gives you certainty over the long haul, as it's the licence costs that drive the bulk of your ongoing annual fees. Typically, usage charges are what end up surprising companies that move away from software for cost reasons. Avoid licence fee structures that impose additional costs the more functionality you use in a system, or that charge you for usage such as number of API calls.

Choose a CRM implementation partner with a track record for quality work - A well scoped project will capture the breadth and depth of your requirements. A well-designed solution will minimise complexity, leading long term to lower costs in enhancements, upgrades and support. And of course, a well implemented project means quality configuration, quality code, quality project management. All of which help mitigate risks and manage costs.

Commit to finding the best (most efficient) solution design - Sometimes that will mean investing in a customisation or integration to give you the features you need. But sometimes it will mean changing the way you do things – evolving processes – to work with out of the box functionality. If you get this balance right, you will end up with a CRM solution that works well for your business and one that delivers a return on investment.