



CRM SELECTION GUIDE

FOUR STEPS TO A SUCCESSFUL CRM PROJECT

DO YOU HAVE A CRM PARTNER?

Unless you have a team of experienced CRM developers and implementation specialists on staff, you should always work with a CRM Partner. Attempting a do-it-yourself CRM software purchase online is one of the riskiest moves you can make (with a quick Google search, you will discover that most do-it-yourself CRM projects fail). Likewise, attempting to manage the enhancement and customization of your CRM system is destined for futility. By working with a CRM partner, you will gain access to specialized resources who each contribute their skills to a project. A typical CRM project will have some combination of Project Managers, Business Analysts, Functional Application Consultants, Developers, Deployment Specialists, and Integration Specialists. Hoping that a single person at your company (your designated CRM administrator) can fulfill all these roles is simply not realistic.

DO YOU KNOW YOUR POTENTIAL CRM PARTNER?

No, not all CRM partners are created equally. Let's begin with a few attributes you will want your ideal CRM partner to have:

- » *People you enjoy working with and whom you believe can get the job done. People who are genuinely kind, who care about their work, who are intelligent, creative, and fun to be around, and who have a track record of good customer relationships.*
- » *An understanding of your industry ... and the more experience, the better.*
- » *Established processes and documentation ... a sign they take your success seriously*

There are other attributes that will be important to you, but the point is ... you should get to know who you are doing business with before you commit to a project. Your ideal CRM partner will help you position your company for structured, long-term growth beyond the initial CRM project. Your ideal CRM partner will help you address the changing needs of your company as your business evolves. Your ideal CRM partner will bring an outside perspective and fresh ideas to the table. Your ideal CRM partner will help you make sense of the stream of future updates and added features that will come along with your CRM system.

In case you didn't notice - I'll point out that you will get none of those things from a do-it-yourself CRM project. Is it any wonder most of them fail?

And, a warning for companies initiating a request for bids or a formal RFP for your CRM project: This type of evaluation process leads to a side-by-side comparison of software features and cost, leaving out the risk factors that typically lead to project failure. Remember these two things:

- » *Choosing a CRM for its features or cost has little to no impact on the potential for success*
- » *Choosing a CRM partner based on anything other than fit will only increase your risk of failure*

A competent CRM partner is the key visionary to identify risk factors, the key facilitator to overcome challenges, and the key advocate for getting your team to buy in to the change.

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Choosing a CRM partner based on anything other than fit will only increase your risk of failure.



WHO ARE YOU BUYING CRM FOR?

Companies considering a new CRM should be prepared to make the best decision for the company, not just for the needs of a single person or department. The truth is, there are only a select few CRM platforms on the market today that provide real value to the whole company. Most CRM applications will check off the right “basic feature” boxes, and even include a few “dazzling tricks” that appeal to a specific job role or department, but they don’t give your company a platform for growth.

ARE YOU PURCHASING FOR SHORT-TERM NEEDS OR LONG-TERM GROWTH?

Small companies typically get started purchasing software apps for very specific short-term needs. The accountant or bookkeeper needs an accounting system. The services director needs a project management system. The marketing director needs an email system. The sales person needs a quoting tool. Over time, as the company grows, more personnel and more software apps are added. The result is a mish-mash of technology that does not work together and forces important company data to become trapped in all the different systems. The earlier a company breaks out of this cycle and chooses a platform, the sooner they will be able to make real headway in transforming their operations, their products, and the way they engage their customers. A platform will help position the company for sustainable, healthy growth.

In the “Find a Partner” article, I shared that do-it-yourself CRM projects rarely work out. The reasons can be linked to the maturity and health of the technology platform:

- » *To help your team transition to the new system, a CRM platform will have a full ecosystem of resources available to help your people use it effectively (not just an FAQ page or support forum). Microsoft has educational user groups, conferences, boot camps, dedicated online learning channels, and more.*
- » *To ensure you don't lose days or weeks of productivity, a CRM platform will have experts who specialize in supporting it (again, not an FAQ page or support forum). Microsoft provides a complete channel to help equip and certify partners to support their CRM customers.*
- » *To get you started on the right foot, a CRM platform will have a proven implementation process (not a “Pay Now” button that leaves you guessing after the transaction).*
- » *To provide value to the entire company, a CRM platform can be customized to meet the unique requirements and business processes of every department. A platform that can be used across the company simplifies your IT and keeps data stable, secure, and accessible to all who need it.*



REMEMBER:

You can choose a CRM that works “for now” or a CRM that works “from now on”.



STEP 2 KNOW YOUR MOTIVATIONS

Think about the scenario above where a company has the mish-mash of apps and trapped data. How many overlapping features are you paying for? How many gaps exist where data doesn't sync across apps, making manual data entry a constant battle? How many different apps do users log in and out of every day? How much time is spent by employees trying to track down information? How easy is it for company leadership to get clear, concise reports? How easy is it to train new employees on business processes? How long will your current software systems last before they need to be replaced, and how easily will they be replaced?

You can choose a CRM platform that works “for now” or a CRM platform that works “from now on”. The latter will give you a platform that you can continue to refine and extend, increasing in value for your company over time. It's best to make a smart investment in the future of your company.

There are many more questions you'll need to ask yourself to unravel your motivations for a CRM purchase, but the best decision will be the one that is best for the entire company.



INDUSTRY APPS
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ARE YOU PURCHASING FEATURES OR VALUE?

In the "Know Your Motivations" article, I mentioned that there are only a select few CRM platforms that provide real value. I chose to become a Microsoft Certified Professional because I believe that Microsoft's platform is uniquely positioned to provide the most value, and they are actively pursuing it. Let's look at some of the foundational points for my belief:

- » *Microsoft Office 365 owns the business productivity space, and applications that deeply integrate with this platform automatically rise to the top in terms of value. Obviously, Microsoft's CRM is built to provide the deepest integration possible with Office 365.*
- » *Microsoft's acquisition of LinkedIn is destined to be a major boost to the social selling and social intelligence capabilities of their CRM, and future integrations will be a serious difference maker.*
- » *CRM systems that are built to integrate with accounting apps and ERP become increasingly valuable as a company grows. The ability to track interactions across the entire "lead to cash" cycle will provide the greatest insights for company leaders. Microsoft is one of the very few companies who can provide real integration between CRM and accounting.*
- » *CRM systems that leverage existing software investments in the form of licensing discounts or bundles can provide cost savings and simplified billing, and that's exactly what Microsoft's CRM does for Office 365 customers.*
- » *While integration is a major initiative for many CRM software companies (and already a reality for Microsoft's CRM), Microsoft made a visionary shift with Dynamics 365. The new vision is for companies to have a common data platform on which all their business apps operate. This will pioneer a new era of data security, intelligence, and efficiency.*

The truth is, software companies are very good at putting together slick sales pitches focused on the software features that will create the strongest emotional reactions. They know that, if tied to strong emotional reactions, CRM buyers will latch on to these features throughout the CRM selection process. The momentum from these emotional reactions can carry a CRM sales team all the way through the purchase decision (to the detriment of other employees, departments, and the company).

While other CRM providers are trying to support their bloated sales teams, polish off their next slick feature demo, and scramble for acquisitions to make up for their lack of a platform, Microsoft is busy envisioning the future of the Office 365 and Dynamics 365 platforms to provide even more value. Even the smallest teams can afford Microsoft's CRM platform, and growing companies will realize tremendous value and savings over time when compared with the alternatives.

Once you have found a great partner, identified your motivations for purchasing CRM, and settled on the right technology platform to drive sustainable growth, the only step left is to prepare for your CRM project discovery session.

Look beyond the features and evaluate whether the platform simplifies or complicates your day-to-day.

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ARE YOU READY FOR YOUR CRM PROJECT?

We have established that a successful CRM project should have completed three preliminary steps:

1. Getting a trusted CRM partner on board
2. Understanding your true motivations for a CRM purchase
3. Choosing a technology platform that can drive sustainable growth

These steps may seem to be out of order (you may be asking yourself “why find a CRM partner before choosing the CRM platform?”). I intentionally arranged them this way because Step 1 is the most important. If you want to make sure something gets done, you do it first.

You may find multiple CRM partners who meet your Step 1 criteria, and who each work with a different CRM platform. These CRM partners will each try to steer you toward their CRM platform, which is why continuing through Steps 2, 3, and 4 is critical.

So, assuming you are ready for Step 4, let's explore how you can be prepared to begin a successful project and what you should expect from your CRM partner.

You expect more than a “Buy Now” button, right?

Through years of CRM implementations of all shapes and sizes, we have identified the two most common scenarios that lead to successful project outcomes. I will outline both.

THE QUICK START PROJECT

A Quick Start implementation is intended to get smaller CRM deployments up and running quickly on the core CRM functions, and then grow into the more advanced functions over time. Almost every CRM project includes core functions like contact, lead, and opportunity management, activity tracking (emails, phone calls, meetings, tasks), marketing campaign tracking, and marketing list building.

As the basic CRM skills are mastered, your team will begin to identify additional functionality they would like to add and changes to be made to make the system more closely aligned with the way your team operates. This is also a good time to begin identifying and standardizing on business processes that lead to the best outcomes. For example, you may establish a team-wide five-step sales process that your leading sellers use to close more business. This sales process could be added to your leads and opportunities so that the entire team can follow them precisely the way they were mapped out.

The Quick Start is a lower cost project methodology that still allows for future enhancements and customizations.



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STEP 4 PREPARE FOR YOUR CRM PROJECT DISCOVERY

THE ADVANCED IMPLEMENTATION PROJECT

An Advanced Implementation Project is usually required for larger, more complex projects. These projects require a deeper level of collaboration to identify requirements for the system prior to the actual software purchase. We begin these engagements with an Inception Phase to carefully define the project, the customizations and modifications, workflows, alerts, and data migration plan.

At the end of the Inception Phase, we deliver high level requirements documentation along with:

- » *System Design Document*
- » *Risk Assessment Report*
- » *Project Plan*
- » *Budget*

At this point, you will have all the necessary information to make a confident “Go / No Go” decision. If you choose to move forward, the software is licensed and the project moves through four stages:

- » **Elaboration** - *Detailed requirements, use/test cases, communication/training plan*
- » **Construction** - *System build out*
- » **Transition** - *Testing, training, go-live*
- » **Support** - *On-going training, future enhancements*

For a detailed breakdown of the 5-step CRM Project Methodology (what we call Sikich Partner Success) referenced in this eBook, visit: <https://www.sikich.com/technology/managed-it-services/>



REMEMBER:

With this information, you should be much more informed about the CRM selection and implementation process. It is my hope that you will consider contacting me about engaging Cloud Nine CRM as your trusted CRM partner. You can begin the conversation by reaching out through any of the contact methods below.

CONTACT

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