

# CRM SELECTION CHECKLIST



## Introduction

A CRM solution executed in your business can make the process less of a hurdle. But the process is not that easy as you're thinking right now. There are a few items that must be checked off first before you begin the implementation process. Of course, there is the assembling of the right team members, your Project Managers, Developers, QA Test Engineers within your company, or you could hire a competent CRM Consultancy to do the work for you.

## Initial Assessment

- Identify the problem
  - Lack of follow-ups leading to losing prospects and customers
  - Bad data management leading to missed sales opportunities
  - No insightful reports to track sales progress and productivity
- Identify the areas effected by the problem
- Research about the CRM platforms suitable for SMBs
  - Microsoft Dynamics CRM
  - Pipedrive
  - Salesforce
  - Black Baud
  - Sugar CRM
  - Hubspot
- List the outcomes

## Solution Benefits

- Team/s benefitting from the solution
- Metrics to measure success
- Benefit parameters
  - Maintain a centralized database across your sales org
  - Manage all communication and interactions with prospects
  - Automate data entry
  - Be reminded to follow up with prospects
  - Organize contact data
  - Segment customers
  - Create sales reports
  - Automate forecasting for your sales performance
  - Scale your sales processes over time
  - Ensure team communication is facilitated
  - Keep the same software as your company grows
  - Make administrative tasks efficient

## Choosing The CRM Solution

- Stakeholders discussion
- Finalize the CRM solution and partner
- Connect with the CRM solutions partner



## Integration Capabilities

- Email client (e.g Gmail, Outlook)
- Email service provider (e.g Mailchimp, Constant Contact, Sendinblue, ActiveCampaign)
- Chat (e.g Slack)

- Marketing automation (e.g HubSpot, Marketo)
- Social media management (e.g Hootsuite, Tweetdeck)
- Customer service (e.g Freshdesk, Zendesk)
- Web analytics (e.g Google Analytics, ahrefs)
- Collaboration software (e.g Yammer, Slack, Basecamp)
- Reporting Services (e.g. Power BI, SSRS reports, Tableau)
- CPQ (compare, price, quote) software (e.g. PandaDoc, Qwilr, Dealhub, Salesforce CPQ)
- Telephony
- ERP (e.g Infor, SAP, Oracle ERP)

## Budget Plan

- Establishing a budget
- Define budget aspects:
  - Annual subscription cost
  - Support & Maintenance cost
  - Integration cost
  - Training costs
  - System migration costs
  - Storage costs
  - Add-on costs



- Budget discussion with vendor
- Budget sign-off

## Establishing Timeline

- Timeline for complete implementation
- Timeline for training reps
- Timeline for go-live

## CRM Partner Discussion

- CRM solution partner discussion
- Schedule a project plan
- Discuss the cost, features, timeline
- Discuss the implementation project plan
- Discuss post-implementation service plan
- Discuss integrating existing systems
- Discuss data management plan
- Discuss data import/export plan
- Create an implementation task force
- Delegate your implementation tasks



## Training Reps Schedule

- Training sessions and module prep
- Classroom training span
- On the job training timeline
- Training assessment
- Training session for under performers

## Post Implementation Plan

- Use Key Performance Indicator (KPI)s to measure success
- CRM user adoption plan - measure usage
- Revisit features of the CRM solution
- Addressing Change management

For a successful implementation, you need to invest not only in terms of money but time and effort too. As the CRM industry continues to grow, ensure you take advantage of its growth to fuel yours. Talk to the CRM experts when you're in doubt. These people could be your own sales reps/managers, the CRM vendor you decide to go with, or other small business owners who also use a CRM. Pick their brain to implement new features.

Connect with us if you want to know more about sales enablement strategies, CRM implementation, and consultation.

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