

How Do I Find **the Right CRM** for My Business?

a guide by

insightly

Why Tracking Your Business in Spreadsheets and eMail Won't Work

Most small businesses initially track customers using email and Microsoft Excel. **And why not?** The cost is low, and both you and your employees are probably proficient with email and Excel. It may be easy to save customer information in spreadsheets, but the problem with that system is that it doesn't scale. You can't do anything smart with it – at least not without relying strictly on your own memory, which has been known to have its moments.

Think your existing system works for you? Here are a few warning signs that might indicate it's time to step up to a CRM application: 

- **MISSED SALES:** Can you easily find that prospect who didn't need your product a couple months ago but wanted you to follow up? Will you even remember to follow up, or will you lose the business because you can vaguely remember the details?
- **POOR ORGANIZATION:** You love Post-It® notes as much as the next person, and you've devised your own system of keeping track of contacts by affixing notes to your computer screen. But is it getting a little trickier to recall every client conversation or find every email message from a customer? And if you've ever let something accidentally slip through the cracks – *missed a project deadline or forgot to follow up* – you can appreciate that there must be a better way to manage this process.

- **DIFFICULT-TO-OBTAIN SALES INFORMATION:** At the end of the month or quarter, does it take you multiple emails and calls to get meaningful reports from your sales team?
- **THINGS TAKE TWICE AS LONG AS THEY SHOULD:** After a staff meeting, each member of your team has a few clear action items. However, at the next staff meeting, have all of these tasks been completed, or did some of them fall through the cracks?

If your goal as a business owner – *and let's face it, most entrepreneurs have this as a goal* – is to continually grow, you need happy, loyal customers.  Even if you have a lifestyle business that you just want to maintain, you still need happy, loyal customers to stay in business. No matter what your goals, a small business CRM application can play a major role in helping your company live up to its potential. A CRM application helps you improve collaboration, productivity, and efficiency so that you can provide the best possible experience to your customers and effectively maximize revenue.



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CRM: People, Processes, and Technology

CRM is not just about technology, but rather the combination of people and processes, supported by technology. 🐦 Without a solid understanding of your business requirements and which metrics to capture for success, your business might run the risk of not fully adopting CRM application, which could end up in data discrepancies, ineffectiveness, and tears all around!

So before choosing a CRM application, ask yourself a few questions to get the best results and ensure the CRM application works for your business:

■ **WHAT ARE MY GOALS AND OBJECTIVES OF USING A CRM APPLICATION?**

Stop and think about why you want to implement your CRM application in the first place. Are you hoping to achieve one or more of the following?

- Manage your contacts more effectively
- Provide better customer interactions
- Become more organized
- Improve internal collaboration and efficiency
(i.e. get everyone on your team on the same page)
- Access a macro or micro overview of your business
- Increase sales
- Reduce manual processes

Whatever your goals, make sure they are clear and that all the users in your company buy into your vision.

■ **WHAT ARE THE KEY PERFORMANCE INDICATORS (KPIs)?**

KPIs are the numbers that will help support your goals. For example, if one of your goals is to increase sales, then what is the number behind that goal? Perhaps your KPI for increasing sales this year is 20%. If another goal is to provide better customer interactions, then maybe the KPI for this goal is to ensure that all inbound prospects are contacted within 24 hours. Determine practical and realistic KPIs for your goals, continuously refine them, and monitor them regularly to ensure you keep your business on track.

■ **WHAT PROCESSES NEED TO BE IMPLEMENTED? WHAT PROCESSES NEED TO BE FIXED?**

Since CRM applications are put in place to improve efficiency, make sure you review all of your processes to see what can be automated. For example, if your KPI is to ensure all inbound prospects are contacted within 24 hours, then what is the most efficient process to make that happen? Also, don't forget to empower your employees by allowing them to participate in defining company processes, as it's likely that they will be the ones implementing them on a daily basis.

■ **WHO WILL USE THE CRM APPLICATION?**

Determine who needs to use the CRM application and get input from all users. Make sure all of the information flows from different departments. If you're a "solopreneur" (i.e., in business for yourself) then this is probably a no-brainer. Even if you have just one employee or you're in business with a partner, you will want to make sure he or she has bought into using the CRM application and understands his or her role. For example, maybe you only want your assistant to create and assign tasks, but you may want your partner to use the CRM application as much as you do. Define each user's role clearly to avoid confusion down the road.

■ **WHAT OTHER BUSINESS TECHNOLOGIES DOES MY CRM APPLICATION NEED TO WORK WITH?**

It's likely that a CRM will be just one of many applications that you will use. In an ideal world all of your applications would play nicely in the sandbox together. However, in the real world there's probably a bit of work to be done to make this happen. Make a short list of the "must-have" integrations between your CRM application and your other applications. For example, if it's critical for your CRM application to connect with your calendar program, then make sure both applications can communicate with one another.

Choosing your CRM Application:

Now that you've determined how your business can benefit from a CRM application, the moment of truth is here. **Choose your CRM wisely.** There are many CRMs for small business out there so make sure to do your research and pick the one that will make your life easier and give your small business the power it needs to grow.

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