

Top 10 Questions to Ask Your CRM Vendor



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Is the proposed solution an integrated CRM suite?

Look for a solution that not only offers sales, marketing, support, and e-commerce, but one that allows you to add these modules as you grow. And make sure it's an integrated approach that gets rid of isolated "islands of data" within your company.

Does the solution support a fast-growing mid-market company...is it a true mid-market product?

Look for a solution that fits your company like a glove. A contact manager promising CRM capabilities or a "stripped down" enterprise CRM solution in a mid-market wrapper doesn't fit. Plus, you need to easily manage accounts and opportunities with the features, security, and other critical capabilities that mid-market businesses need.

Is the solution powerful enough to support users no matter where they are or what time it is?

Look for a solution that allows your users to work anytime, anywhere, and with any device—powerful remote, synchronization, web, and wireless functionality.

Does the solution easily integrate with your back office?

Look for a solution that easily integrates with leading mid-market back-office software—and one that's easy to implement, too.

Does the solution scale and can you customize it to your needs?

Look for a solution that grows with you whether you have 20 users or 2,000—and one that you can easily customize to meet your most specific business or industry needs. Rigid industry templates too often ignore your company's business processes.

Can you implement it fast and do users find it easy to use?

Look for a solution that naturally fits the work processes of all employees and your company so that very little training, if any, is required. And make sure it's one you can implement fast to avoid lengthy downtimes in your business.

Will the solution maximize my return on investment (ROI)?

Look for a solution that gives you benefits like increased sales, greater customer satisfaction, accurate forecasts, and better communication—not one that delays your ROI with an exceedingly complex design.

Does it offer effective Windows and web integration along with hosting options?

Look for a solution that offers a number of options for accessing your customer data including Windows and web options—not a rigid model where you're forced to access data only through the web or application service providers (ASPs).

Is it cost effective?

Look for a solution that gives you significant value—like straightforward pricing and a low total cost of ownership—without draining your financial resources. And make certain that there are no hidden costs involved with lengthy implementations or customizations.

Does the company offer a local business partner network?

Look for a solution that offers a business partner network that understands mid-market businesses in your community. And make sure that your business partner builds an on-going relationship with you to stay on top of your needs.