

# 5 Keys to Selecting the Right CRM Partner



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Selecting a vendor may be the hardest and most confusing part of adopting CRM. This whitepaper will arm you with information and best practices to help you make the best decision for your company.

The price of CRM keeps coming down and the number of features keeps going up. That sounds like a good thing for the consumer, doesn't it? Not necessarily. Distributor, rep and manufacturer satisfaction with CRM continues to be low. Why? Because companies feel like they can buy any CRM and make it work for their companies. But it doesn't work that way.

A key part of the equation is selecting the right CRM vendor. Here are five best practices to selecting the right CRM vendor for your business.

## **1. Build a CRM solution around your business. Don't build your business around the vendor's offering.**

Identify and prioritize the gaps in your sales process you need to fill. Use that as the base for what you need in a CRM package. SalesProcess360 offers tools that can help you identify and prioritize these needs. When you engage with potential vendors, tell them your company's back story and share the list of challenges you want to solve and processes you want to improve. These vendors should then provide a sales pitch customized to your company's needs.

## **2. Compare apples to apples with a consistent approach to demos.**

When embarking on demos, make sure everyone on your CRM evaluation team is on the same page. They should attend all demos and fill out a scorecard for each vendor to ensure an apples-to-apples comparison between systems. Using scorecards provides an objective way to keep moving forward and can help you avoid analysis paralysis. Establish guidelines that can help you get to your final two vendors so that you can do true due diligence for an informed decision.

## **3. View your CRM vendor as a partner, not just a provider.**

You should not only be looking at selecting CRM software, but a CRM partner for the long-term. This is critical if you want to get true ROI. Unfortunately, this is where many companies fall short. They spend most of their vendor evaluation time on features. But it's just as, if not more, important to ensure the CRM company you select will be a good partner. Will the company bring value to the equation or is it just selling you software?

How do the vendor's priorities align with your CRM road map and where your company is heading?

How do you know if the CRM vendor courting you is the right fit? First, ask questions that require more than just a simple yes or no answer. Does the vendor bring ideas and real-world stories and examples to the table? Does the vendor do what it says it will do, even in the evaluation stage?

## **4. Don't be afraid of the cloud.**

Many of the solutions you'll find today for CRM are cloud-based, providing your team with the ability to access the data and solution anywhere it goes. With cloud, you'll usually get an up-to-date solution. There are no big upgrade processes as with an on-premise solution hosted on your own servers and computers. In other words, you won't need to buy the same software over and over again every three to four years. If there's an update, it's typically included.

Cloud-based solutions also tend to be more reliable and have more functionality and security. In all but the largest and most technical firms, a cloud-based solution will offer greater security and reliability than an on-premise solution because most vendors have greater resources than your internal IT department.

## **5. Don't just think about your needs today; consider where you would like to be 12 to 24 months down the road.**

The ideal situation is to get as close to an out-of-the-box solution as possible to meet your needs. It will be easier to use the software from the get-go, and you will have a greater chance of success. That said, ask the vendor to give you an idea of where it's going. How does it prioritize its features and future development? How does that align with your CRM road map and where your company is heading? This requires that you understand where you're going before you start the CRM evaluation process.

Use SalesProcess360 tools to evaluate gaps in your sales process and chart a path to CRM success. Learn more at [salesprocess360.com](http://salesprocess360.com).

Selecting a vendor is probably the hardest decision you will make. This is not a one-time date; you're getting married. Good luck and choose wisely.

*This whitepaper is based on Brian Gardner's book, ROI from CRM: It's About Sales Process, Not Just Technology, available at [mdm.com/roifromcrm](http://mdm.com/roifromcrm).*

SalesProcess360 is made up of industrial sales specialists with real-world experience and passion to help you put in place winning processes on the front end of the sales cycle.

## About Founder Brian Gardner

The founder of SalesProcess360, Brian Gardner, has spent more than 25 years in sales and sales management in the industrial market. He served as sales manager for a major regional rep/distribution company for 15 years before he founded Selltis, LLC, the only industrial-focused sales team CRM solution with roots deeply embedded in sales process improvement. Having guided Selltis to success, he has taken his passion for process improvement to the speaking and coaching world as the founder and lead evangelist at SalesProcess360. He is the author of *ROI from CRM: It's About Sales Process, Not Just Technology*.



Brian was a faculty member at the 2016 University of Innovative Distribution in Indianapolis. He is also on the speaking circuit for many process control and industrial associations. He has conducted seminars on the topic of sales and sales management at Texas A&M (Industrial Distribution Department), Case Western Reserve University, Sales Management Association, MCAA (Measurement and Control), CPCA (Canadian Process Control), ISA (Industrial Supply Association), NAHAD (Hose and Accessories) and ISA (Instrumentation and Process Control), along with being a presenter at annual sales meetings for various companies.

He has worked with many manufacturer and distribution companies to put in place systems to improve their sales process management on the front end of the sales cycle. Brian earned his BS in Industrial Technology from Louisiana State University, as well as working in Switzerland during college in manufacturing and marketing for a pressure and temperature technology company. Brian is a devoted family man. He lives in the New Orleans area with his wife and 3 children.

## About SalesProcess360

SalesProcess360 helps companies get ROI from CRM. At SalesProcess360 our ability to help you grow your business is all about focus and processes. It doesn't have to be complicated. Focusing on effective yet simple processes to manage the "blocking and tackling" of selling will put you ahead of your competition. Our passion is to help you get there.

Services include:

- CRM Audit
- Sales Process Consulting and Coaching
- CRM Utilization
- Industrial Sales Management Peer Groups
- Sales Process Review and Mapping
- Speaking and Seminars

**Learn about SalesProcess360 at [salesprocess360.com](http://salesprocess360.com).**