SalesProcess360

Helping Companies Get ROI from CRM

CRM Demo Checklist

SalesProcess360.com

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Selecting a vendor may be one of the hardest and most confusing parts of getting the most from CRM.

A demo is a standard, but critical part of vendor selection. The first demo will cover the basics: the features and benefits that the software provides. The second demo should address your specific needs and provide an opportunity to revisit features from the first demo or ask questions to clear up any concerns you may have.

Your entire CRM evaluation team should participate in these demos, and each member should fill out a scorecard similar to that on the next page. Notice this does not include your features wish list, but it does address some basic and important things to include in your evaluation.

Use this as one tool in your post-demo meetings to review each vendor. It will give you standard guidelines that can help you get to your final two vendors.

### Add SalesProcess360 to Your Evaluation Team.

We can help you define specifications, make the most of software demos and identify providers that will meet your needs.

Or call us for a CRM Audit.

A SalesProcess360 CRM Audit will help you take a step back, identify gaps in your sales processes and determine what it will take to fill those gaps. The result: a clearly defined plan for ROI from CRM based on your company's true needs.

This demo checklist is excerpted from the book *ROI from CRM: It's About Sales Process, Not Just Technology*.

Order your copy at mdm.com/roifromcrm
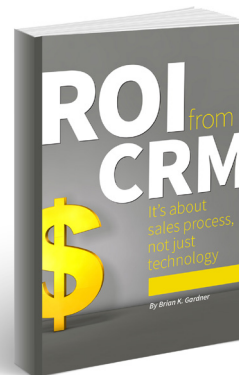
SalesProcess360 CRM Demo Checklist	Rank 1-5, 5 being best			
© SalesProcess360 2016	Vendor 1	Vendor 2	Vendor 3	Vendor 4
Company				
Years in business				
Success in our industry				
Local support				
Hours for support				
Technology				
Open source				
Open API				
Built-in integration modules to standard ERPs				
Outlook integration				
Google apps integration				
Export to Excel				
Integration w/3rd-party email marketing				
Software				
Ease of use				
Expandability (grow as company grows)				
Online help				
Integrated reporting and charting				
Mobile app				
Onboarding				
Program to help us identify where we should focus				
Onboarding process & procedures				
Program after initial training to keep us moving forward				
Training program				
Online training documents and videos				
Other				
Can our company work with provider?				
Can CRM provider bring value?				
Does CRM provider truly understand our business?				
Does CRM provider have a user council?				
Is CRM provider investing in technology?				
CRM provider's process for prioritizing new development				

Helping Companies Get ROI from CRM

Our team is made up of industrial sales specialists with the 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 is a Subject Matter Expert in CRM at Texas A&M University. He 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 industrial sales organizations get ROI from CRM. We believe it's about process, not just technology. We work with companies at all stages of CRM, from CRM selection to ongoing training long after implementation. We offer CRM audits, evaluations, implementation coaching and management training. We also offer coaching on sales process and speaking services for associations, manufacturers, distributors and more.

Learn about SalesProcess360 at salesprocess360.com.