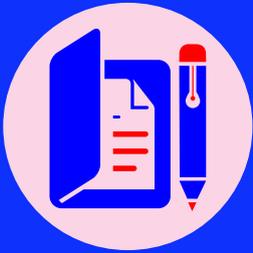


How to choose a CRM vendor

Need a CRM for your business but not sure where to start? Follow these steps and you'll soon be on your way to a match made in CRM heaven.



LIST YOUR NEEDS

Map out a customer's journey — what do you need from your CRM to exceed expectations at every stage of the lifecycle? Note down the features you need to run customer's day to day, how many users need access, and what you can afford to spend.

MAKE A WISHLIST

Which features would make your life easier? Which functions do you need to grow your business, or change how you do things for the better? Make a note of capabilities that will help your business do more, and go further in the future.

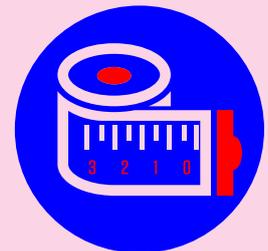


SEARCH FOR VENDORS

Search for vendors, look at their features, and see how many you can tick off against your wish lists. If they can take care of all your base requirements and have at least a few capabilities that could help with long-term goals, add them to a shortlist.

EVALUATE VENDORS

Contact the vendors on your shortlist and ask for more information. In addition to features, remember to take into consideration other key factors such as vendor experience, total cost of ownership, update frequency, support, and third-party integration.



COMPARE VENDORS

When you've grilled a few vendors, and you've got a full picture of what their CRM solution offers, it's time to line them up and see which one best fits your needs. Create a scoring system to total up their suitability and a clearer idea of whether they make the grade.



Source: Nigel Frank International

