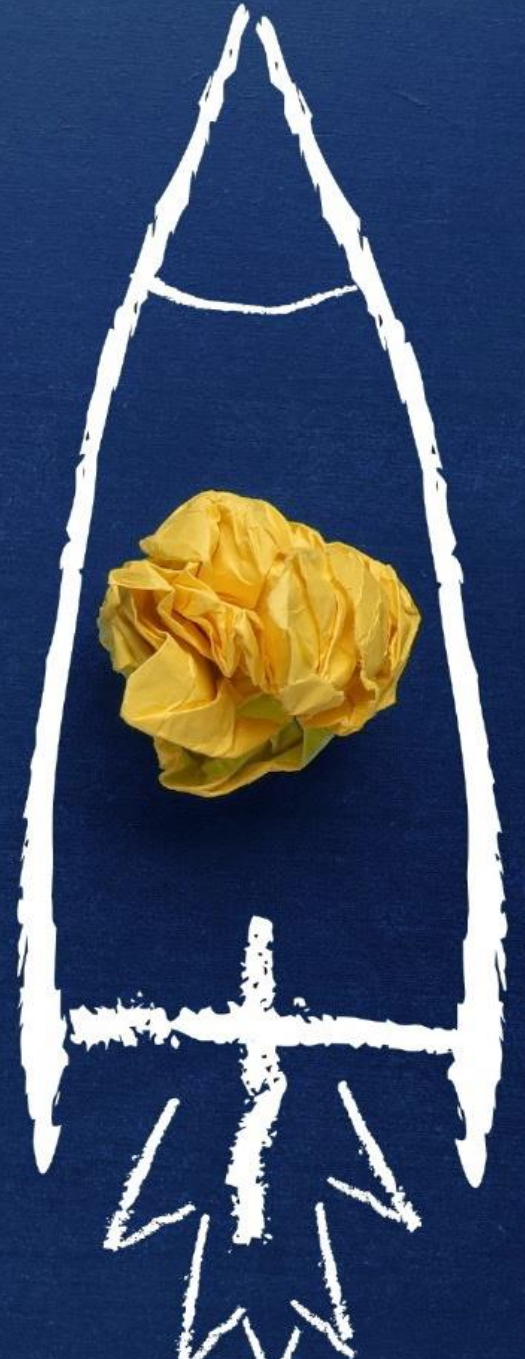


SELECTING A CRM





WHO'S THIS GUY

- Recent CRM project – share learnings!
- About me:
 - Filled many roles from retail sales to VP since 1995
 - Build own very basic CRM in FileMaker 3 in 1996 on MacOS
 - Used: NetSuite, Salesforce, Siebel, Act!, HubSpot, FreshSales, etc.
 - Try not to be boring
 - Not sponsored!



WHO THIS IS FOR

- First time CRM buyers
- Upgrading from an older / legacy platform
- Organizations with few tools
- Executives & decision makers
- Non IT individuals
- Start-ups
- Curious business people



WHAT IS A CRM?



Marketing



**Digital
Commerce**



Sales



**Customer
Service**





IT'S A PEOPLE THING

- People are creatures of habit
 - New <> Good, therefore change = bad
 - Learning = not fun
- Creating buy-in is critical
- Focus on user benefits
 - Faster
 - Simpler
 - Do more with the same effort





WHO ARE YOU?

- Business sector
- Business size
- Business objectives & ambitions
- Remote & mobile employees?
- What are your needs
- Did you map your business processes?
- Tech-savvy-ness
- Budgets for this
- Who will actually use this
- Pain points to resolve



DEFINING YOUR NEEDS

- Centralize information
 - One master system for integrations to rule them all
- Manage & track business objectives, progress and results
 - Marketing campaign efficiency
 - Sales quotas & forecasts
 - Order processing
 - Customer service management
 - Data analytics & reporting
- Efficiency
 - Which tasks done by your team.. take too long?



DEFINING YOUR NEEDS

- CRM should match your business processes & tech investments
- Involve all business unit leaders
 - Marketing
 - Sales
 - E-commerce
 - Customer service
 - Finance/accounting
- If a group wishes to keep a specific tool, it can be considered



CRM INTERNAL OWNER

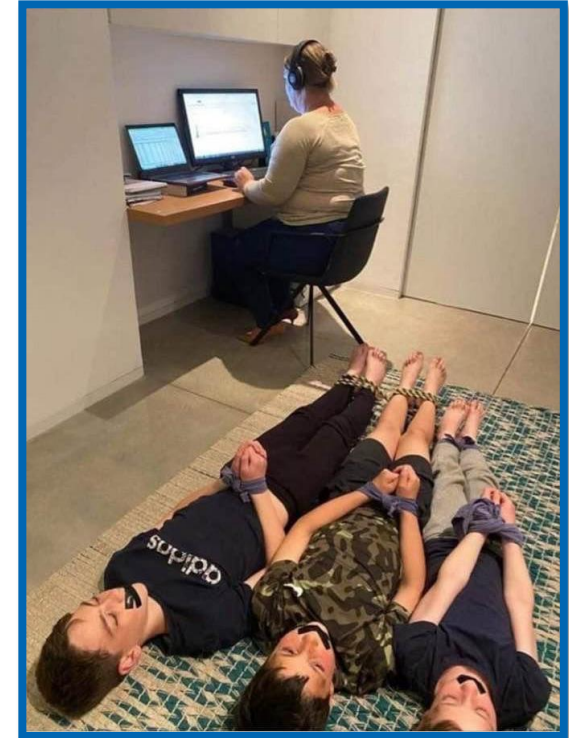
- Runs the project!
- Benefits:
 - Product certifications
 - Internal growth opportunity
 - ..pay raise? ..bonus? hmhhh?





OFFICE & MOBILE

- Mobile CRM app = essential
- Expect users to work from anywhere
 - Computing
 - Telephony
- Consider cloud-based solutions
- Team management by objectives
 - Reports
 - Quotas





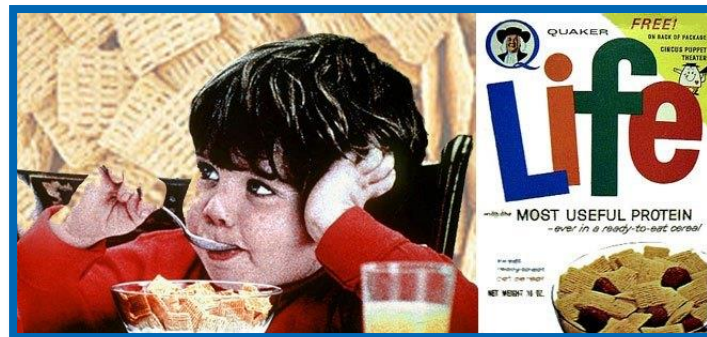
COOL CRM ADD-ONS

- Proposal management, e-signatures & payments
- Telephony & communications (built-in or integration)
- Sales & data enrichment tools
 - Corporate information
 - Contact information
- Automations to other systems
(project management, website, accounting/billing, etc.)
- Social information & marketing
- Tech support & customer service engagement tools



YOUR PILOT TEAM

- Department representatives
(sales, marketing, e-commerce, customer service, etc.)
 - Department admins
- One or more executive
- Regular users
- A low-tech team member
- Adversarial person in this project
 - “Mikey likes it”





CRM CRITERIA HINTS

- Prior system(s) → Data migration?
- Vertical specific needs?
 - Car dealerships, healthcare, financial services, etc.
- On-premise or cloud?
 - Commercial or open-source?
- Email integration: not all CRMs work with all email systems
- Voice (compatibility)
- Existing tools inventory
(e-commerce, fulfillment/inventory, website)



IMPLEMENTATION HELP?

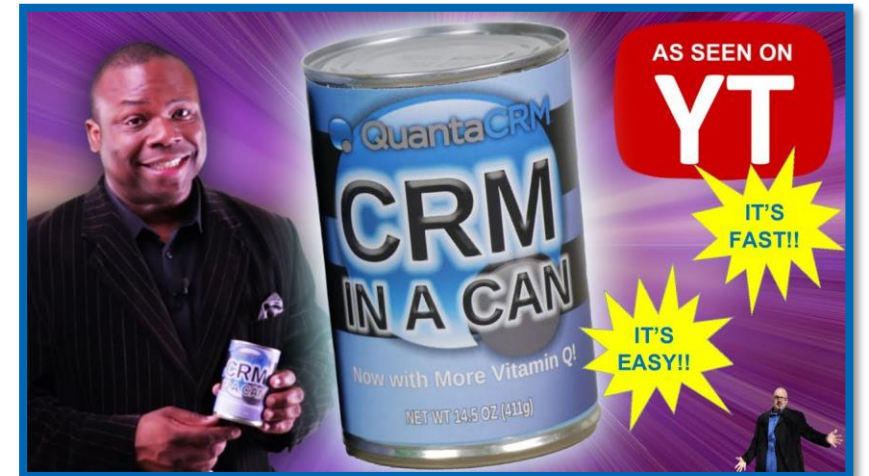
- Assess your internal capabilities
 - Do you have internal skills
 - Do they have bandwidth
 - Do they have the skills to configure and perform data migration if moving to a new vendor?
- Identify integration partners as needed
 - Local is preferred
 - Train the trainer and/or train your teams
 - Project management
 - Avoid pitfalls through experience





PRODUCT SELECTION

- Build a matrix!
 - Red/yellow/green coding is always fun!
- Free matrix template:
www.rock8fuel.com/crm
(includes a list of potential vendors)
 - Customize it to your needs!





CLOUD CRM PRICING

- Free plans are very limiting
 - Little to no customization, missing reporting & integrations
- Basic / starter plans can be limited (10\$-20\$/user/month USD)
 - Limited customization & fields
 - No sales forecasting
 - 1 sales team
 - Email marketing limitations
- Vendors push “Pro” plans (35\$-50\$/user/month USD)
 - Complete feature set
- Enterprise plans
 - Larger organizations or specific needs



TRYING OUT #1

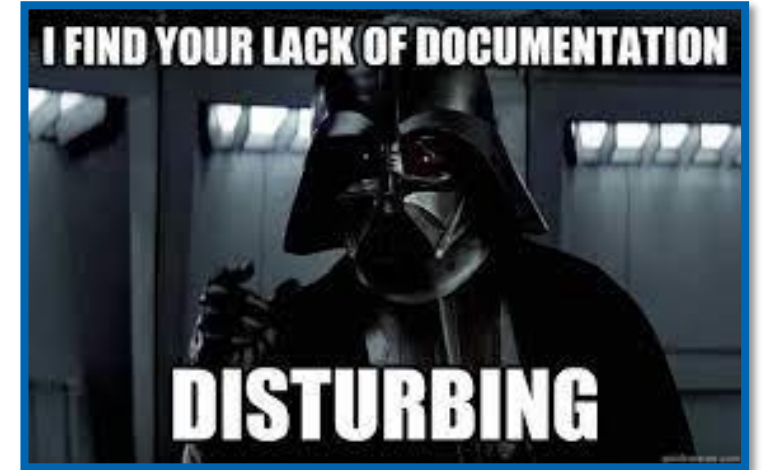
- Have sample “real” data ready
- Create a “sandbox” project isolated from your current systems
- Replicate your processes (within reason!)
- Get your pilot team to try the selected tool
 - Find what works
 - Find what needs improvement
 - Try to break it
- Consensus: keep or try #2





DOCUMENTING

- Make documentation available BEFORE rollout
- Build documentation on YOUR implementation
- Use your internal communication platform(s)
 - SharePoint
 - Google Sites
 - Wiki
- Use visuals:
 - Screen captures
 - Screen recordings with audio





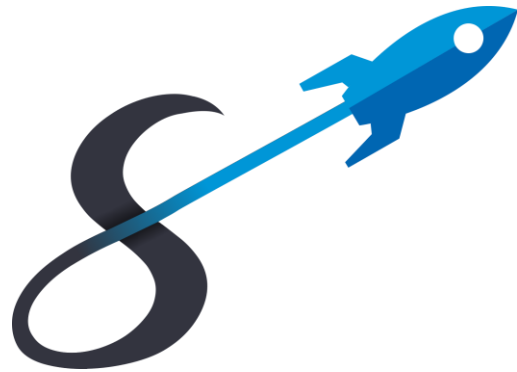
TRAINING & ROLLOUT

- Small bites!
- One group at a time
 - By department
 - By teams
- Try avoiding parallel systems but have a backup plan
- Gamification
- Do not panic





THANK YOU



Jean Pascal (JP) Hébert

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