

TOP TIPS

(OR WHAT NOT TO DO)

There are some common mistakes we often see organisations make when they approach the purchase of a new CRM solution, here are some of the most “popular”, so you know what not to do:

01



Replacing old with new, but not addressing the underlying issues

Often organisations find they have challenges with their existing systems but don't understand if those issues are based on functionality, poor data, a badly implemented solution or outdated process design. Simply replacing your existing CRM with shiny new technology will not correct these issues – in fact, it may exacerbate them.

02



Not articulating your requirements

One of the items often skipped in the process of gathering your requirements is understanding your overall objectives at the highest level. It is important to articulate to your chosen provider what you're organisation is planning to achieve over the coming years. This is not just important in the selection and implementation of a new solution, but as a measurement of success throughout your partnership.

03



Making a final decision based on price

Often if several providers can say yes to your requirements, organisations will whittle-down the providers based on price. Of course, price is important, but it is not always as clean cut as that, particularly in a time when many different pricing models are in play. Understanding value and a return on investment is much more important, and vendors should help you to understand how their solution can best bring value to your organisation.