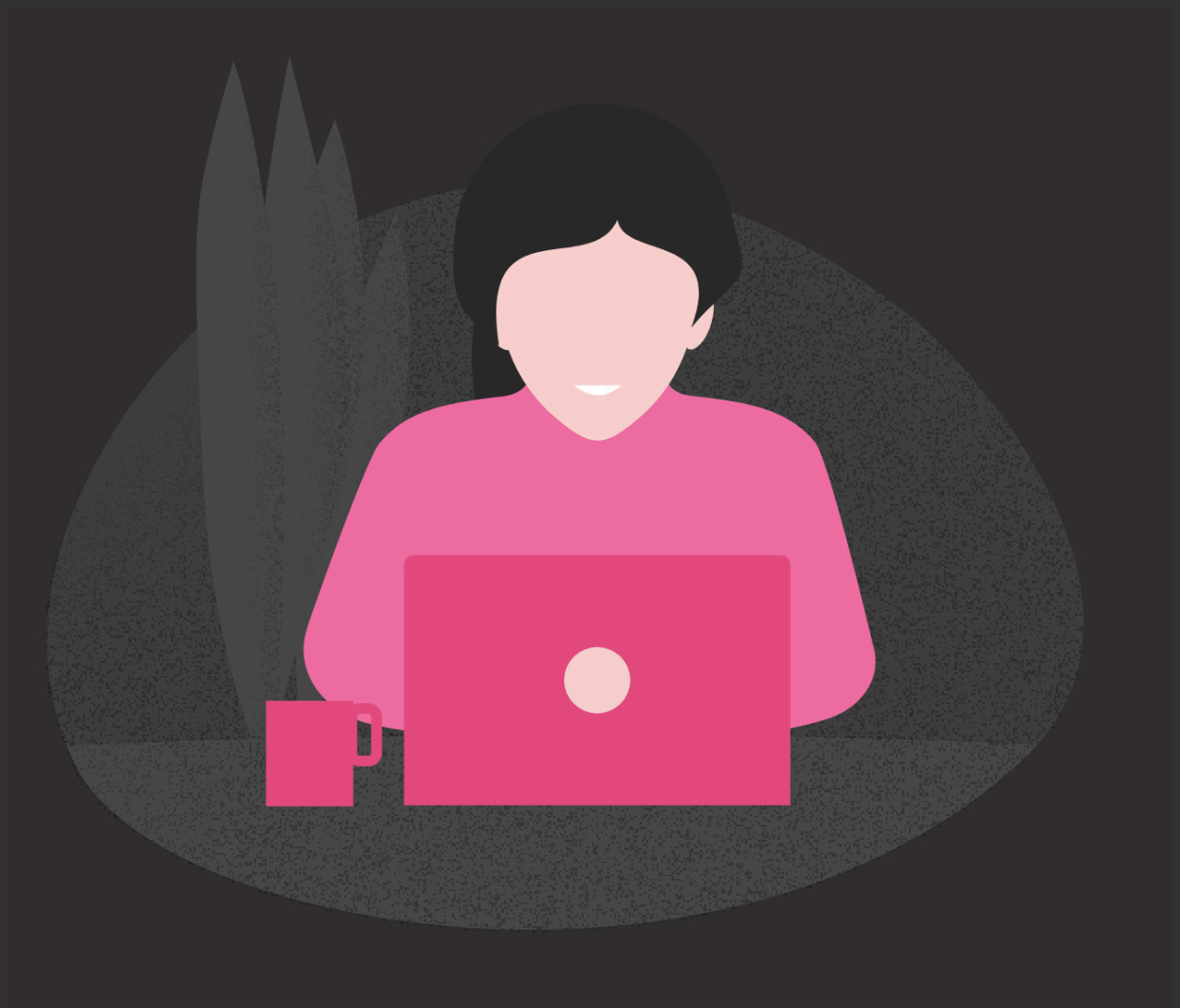# Buyers guide to choosing your CRM expert

For start-ups and small businesses

Seamless**ideas**

The expert
in anything
was once
a beginner

Introduction

Do you know what happens when a CRM implementation fails at a company? It is not too hard to imagine. Loss of data, waste of money and billable hours, drop in morale, and all the other problems that stem from the aforementioned consequences of failure.

Before any organisation dips their toes in the CRM adoption river, it must decide a few things first. We have created a list of those:

- You must decide if such a system is required and if it will contribute significantly to your business' sustained success.

- You need to find and select the best and most appropriate CRM for your business.

- You need to have a plan for the implementation and integration of CRM within your organisation.

- For successful implementation and/or integration, you need to allocate time and resources towards correct configuration according to your business requirements and facilitate ample user training & user involvement.

Keeping all this in mind, your task would be much simpler with the right CRM expert, especially for startups and small businesses. Now you may ask why you need to hire an external CRM expert or consultant?

While it is not necessary, your business can benefit a great deal more if you consult a CRM expert when adopting a CRM based approach. By the end of this guide, you will have the information necessary to hit the ground running when you decide to hire a CRM expert for your startup or SMB.
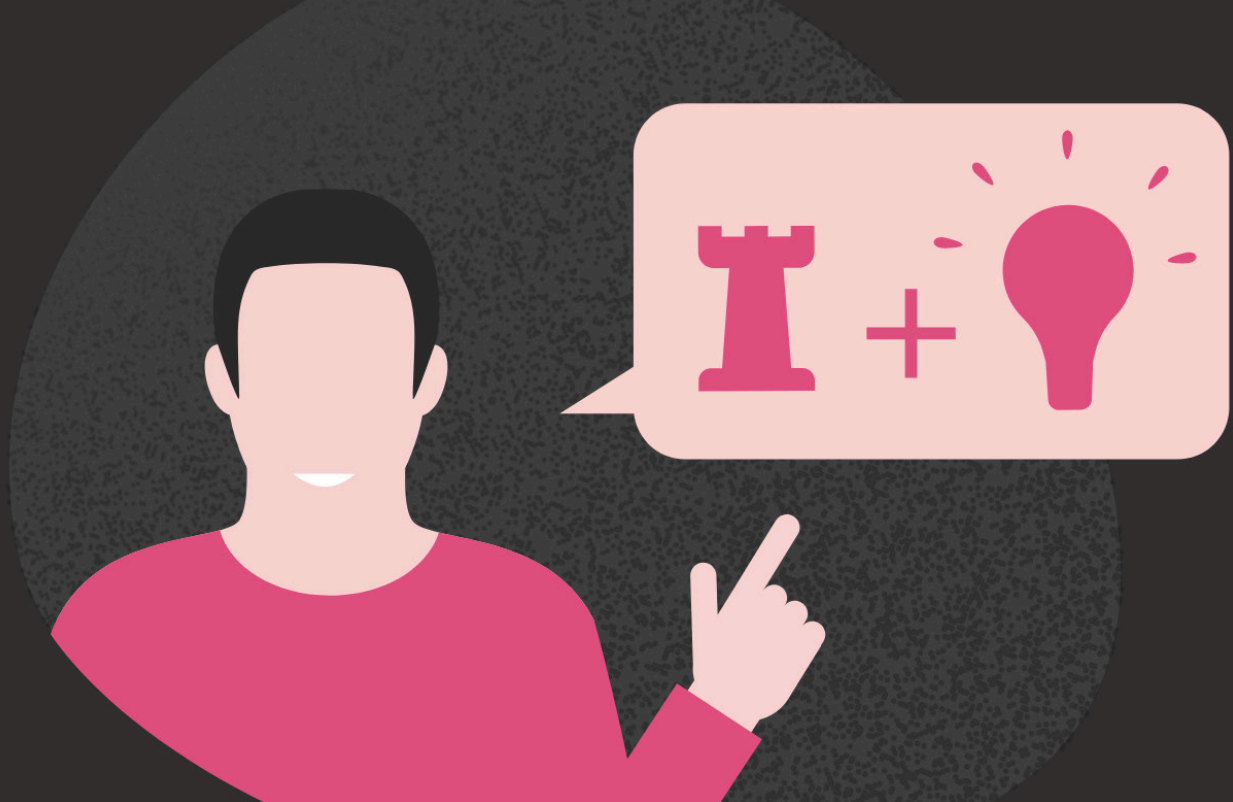
Chapter 1

Why you need a CRM expert?

A CRM expert's job is to guide your organisation through the transition to CRM. The whole process can be divided into two periods. Pre-adoption and post-adoption. More precisely, the first period is before you "start" introducing CRM to your business while the second period begins with the introduction.

CRM Selection Process and Decision

If you have read our ultimate CRM guide for SMBs and startups, then you already know that identifying the right CRM for your business takes work. A CRM expert can objectively assess your business requirements, growth goals
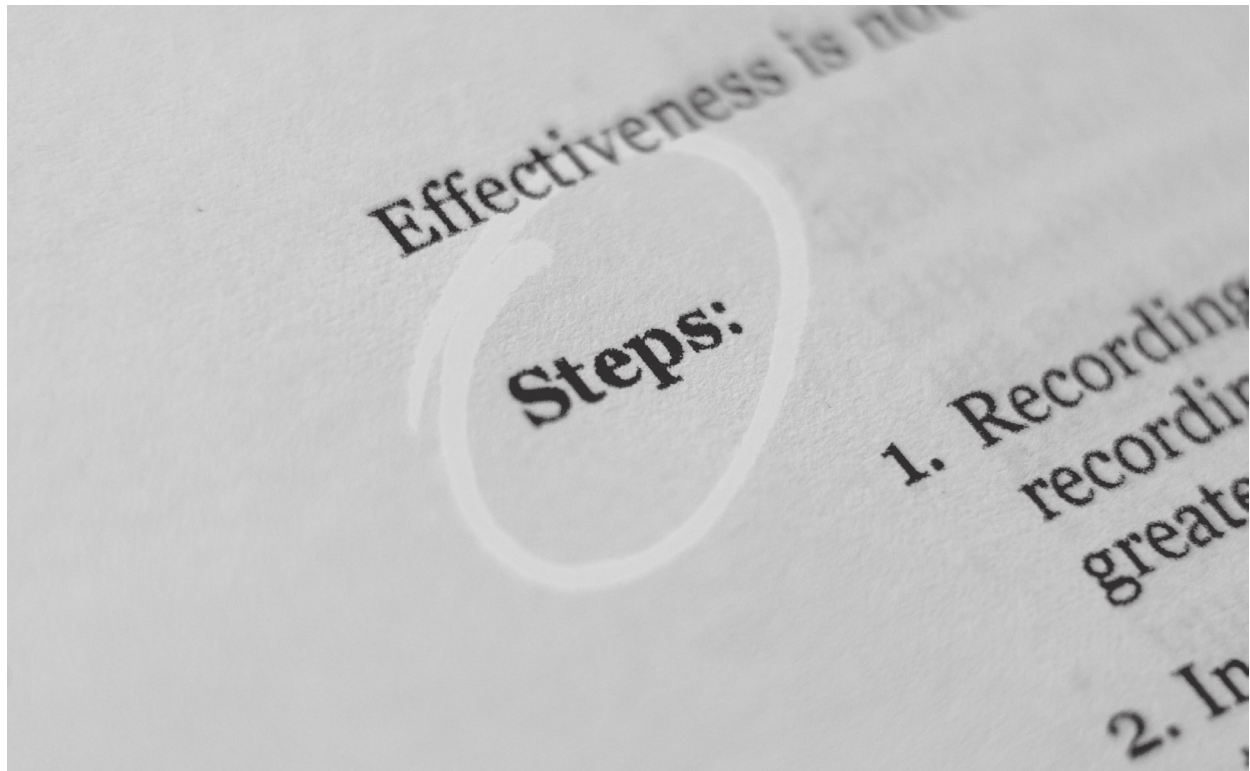
and budget and suggest compatible CRMs based on their strong points and weaknesses. Similarly, a CRM expert would gather requirement from your best employees and supposed CRM users in a way that leaves no doubt as to what CRM features are critical, which would be beneficial and which ones are not required.

Information coming from CRM vendors would not be impartial; it would tilt towards showcasing a product's best features and not otherwise. A CRM expert would objectively help you decide which CRM features are most required for what functional business requirements. You will have more control in deciding what you see in demos and will meet with vendor's sales engineers on an equal footing. Negotiations with the vendor would be easier, too, with an expert on your side who has prior experience with that.

The key stakeholders involved in the decision should all have a say and not feel left out when such a big decision is being made - your CRM expert will have experienced such things before and should be able to find a structured process to involve key personnel in the decision-making process.

CRM Implementation, Integration & Training

Once you have bought your CRM and started the adoption process, your CRM expert can be useful in helping you maintain a long-term relationship with the CRM Company. Moreover, the most important part is ensuring that you have a workable plan to move your business on to a CRM platform.

> **A CRM expert with prior experience in launching such SOPs would take into account your company culture, goals and with your help come up with a practical solution.**

This can be done by establishing clear milestones in how you roll-out your CRM. User adoption, user training, data migration and communication with the CRM company's support team should all happen in tandem without disturbing your regular business and creating an extra burden on your employees.

Once you start to use a CRM instead of excel sheets and ad hoc solutions, you need to have definitive, defined business processes and need all users on the same page about Standard Operating Procedures (SOPs). A CRM expert with prior experience in launching such SOPs would take into account your company culture, goals and with your help come up with a practical solution.

Chapter 2

What are the common problems businesses face during CRM adoption?

Seamless Ideas' Director of Salesforce Operations, Muhammad Adil, has seen dozens of CRM implementations (if not more) across businesses of all sizes. When asked about the challenges a startup, an SMB or even SMEs face during CRM adoption processes, he identified the following as the common hurdles.

1. Change Management

Adil says that the sales teams or representatives mostly use traditional ways to capture customer information and other data so the reluctance to switch to CRM stems from the fear that they will end up losing their jobs to the software.

2. No defined KPIs

According to Adil, one of the biggest problems faced by businesses, even SMEs, is that they haven't defined KPIs to measure their business performance and employee performance.

3. Master Data

"If they are already using a CRM, they store their data in different spreadsheets or free CRM systems which often lack proper maintenance of data." Adil said when asked about companies already using a CRM. "When these companies move to any other CRM system they face challenges in bringing over the entire correct master data."

4. Integration Issues

"Some businesses already using a CRM don't have the budget to integrate with their ERP/Billing system or their legacy system doesn't support proper APIs which doesn't provide a true reflection of the stored information."

5. User Adoption

Adil thought that since many small businesses, startups and SMEs have small teams whose members switch jobs quite often; this causes issues in maintaining user adoption. CEOs or Directors usually lead the implementation but do not have time to train every user to effectively use the system based on best practices.

At Seamless Ideas, we have created a training portal with past videos, lectures, training sessions and other resources all collated in one place so new employees/users don't require someone else to spend much time training them which saves time for experienced professionals. This is a viable solution for every business especially startups and SMBs.

> **Automation without consideration of the end to end process and its impacts is not going to be effective.**

6. Lots of Automation

"One of the biggest problems", Adil insisted, "is that companies want to have lots of automation instead of building a strong foundation. The truth is that automation without consideration of the end to end process and its impacts is not going to be effective."

So now that you know what problems companies face with their CRM implementations - some of which could be particularly expensive or even critical, especially for SMBs and startups if not dealt with correctly. Let us move on to discussing how you can work a CRM expert to ensure your organisation successfully rises to these challenges.
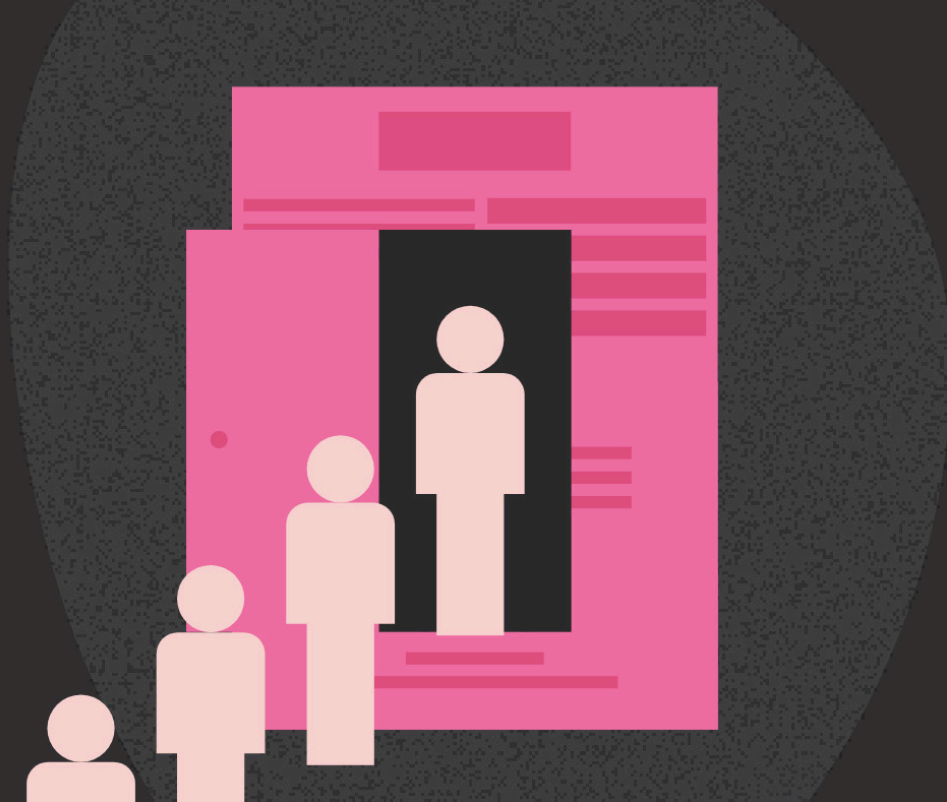
How to hire and work with a CRM consultant/expert(s)

Before you start working with an expert, you need to develop a strategy or process to follow. How to do that? Let us find out.

Finalise your budget

This is step one. Your budget for a CRM and your budget to hire an expert are all connected, therefore you and your team need to be clear about the cost of the whole transition and everything it entails. Your productivity may suffer during the testing and go-live period. It is a good idea to perform a

> **Before you hire someone, you need to identify your business goals; the problems standing in the way of those goals and the type of consulting that would assist you in achieving your objectives.**

complete risk assessment to be able to better handle possible complications.

The consultancy fees, software cost, employee overtime, staff training and other costs can sometimes sneak up on employers. It is a good idea to finalise a realistic budget with all possible considerations including a "just in case" buffer.

Hire experts

As we mentioned earlier, businesses hire consultants/experts for different reasons based on their requirements. Before you hire someone, you need to identify your business goals; the problems standing in the way of those goals and the type of consulting that would assist you in achieving your objectives.

It is vital to be thorough in your search for a CRM expert. Whether you need them to be a part of your business for a significant duration of time or you are looking for a temporary consulting service, you need to be clear about what is most important to you. Whether it is the expert's experience, the reputation, the success, ease of communication and access, compatible methodology, or something else, if you have the right idea about your needs and values, you will find the right partner.

Create a core implementation team

You'll increase your chances of success if you keep to a small core CRM team to confront all the technical and organisational challenges during the project. Of course, everyone in the team needs to know their strategic and functional role as determined by the leadership team based on their expertise.

You also need the CRM expert/consultant to provide their perspective. You will need a project manager, developer(s), business analysts, and representatives from all relevant departments to ensure there is no confusion or U-turns later on that could cost time and money. Your CRM expert's experience will be valuable here in forming a team that is effective and efficient.

Identify your timeline

Having a proper timeline is important to make sure you are reaching your milestones without compromising on quality. It is the job of the project manager to ensure everyone stays on the timeline and any hurdles are overcome proactively. It is the business leaders' job to establish a timeline that is realistic, ambitious and acceptable by everyone, all at the same time.

A CRM expert with prior CRM implementation experience in your industry would be in the best position to advise you on an achievable timeline considering your goals and challenges.

Create a change management plan

Change management deals with making the change as easy and seamless as possible for everyone in your company. As stated earlier in the second part of this guide, businesses struggle with change management and that in turns affects employee morale and productivity.

You need to know if there is resistance to change in your company. With proper training and encouragement, people can be open to change especially if it makes doing their jobs easier. Invite employee feedback in the infant stages of your CRM rollout to ensure that at no point one or more of your departments feel confused and/or stretched juggling the transition on top of their regular work.

Test and go live

Ask your IT staff and all affected departments to test the new system with real or sample data depending on your preference. Test all of the following and more if you need:

- Performance

- Usability

- Integrations

- Functionality

- Data

- Reporting

- User Acceptance

- Automation

 If there are any issues, you have the time and opportunity to fix them before going live. Once everything is in place you can prepare to go live. Make sure to have backup data processes ready, your monitoring and evaluation teams prepared, you have an alternative communication strategy for system downtime, and CRM support staff on call if necessary.

It is best to roll out in phases instead of a complete change in a day, however, seek your CRM expert's advice in making this decision. With a gradual rollout, you can train your employees/users in batches and continue legacy operations in many areas whilst slowly introducing the platform.

What questions to ask before hiring a CRM expert:

- What is your total CRM consulting experience?

- How many CRM platforms do you have experience with?

- What industry or industries do you specialise in?

- Have you worked in our industry?

- Do you have CRM product development or CRM service provider experience?

- What is your delivery capacity? What team do you require?

- How much help can you provide in CRM customisation and training?

If you are satisfied with the answers to these questions, the CRM expert is probably the right choice for your project.
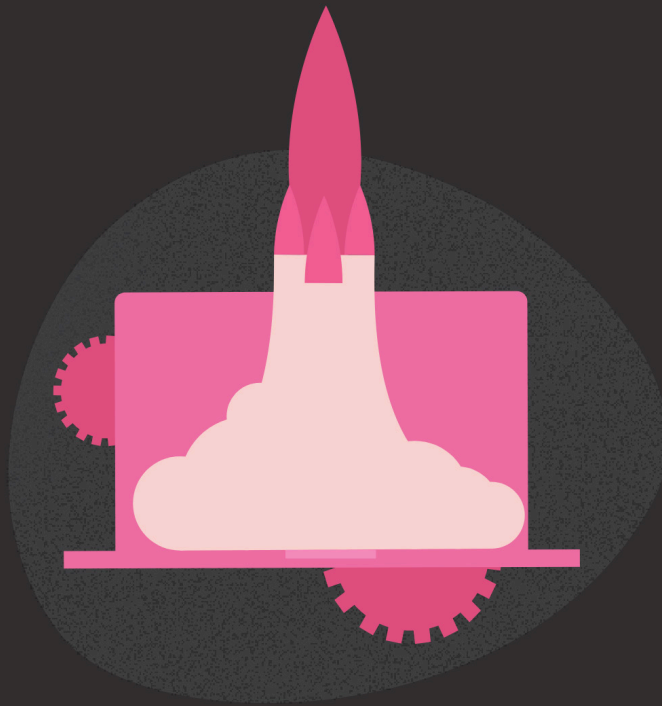
Chapter 5

Benefits of hiring a CRM expert

Now that we have discussed the process of hiring a CRM expert, let us summarise the benefits.

Guidance with the Right CRM

If you are looking for a selection consultant to help you choose the best CRM, an expert in the field with prior experience makes your job easier.

" A CRM expert will be experienced in adding additional customisation or external integrations to a CRM system.

Best Industry Practices and Past Experience

A CRM expert would know the best industry practices suitable for your company. Your startup or SMB would avoid the common pitfalls much more easily with the guidance of an experienced partner guiding you. Perhaps your profile matches another company that the consultant has successfully worked with and they can apply some of the same solutions instead of starting at square one.

Time vs Cost Balance

You may be able to complete a CRM adoption without hiring an expert but it is going to cost you time as well as future costs if something breaks down in your implementation. With an expert, you are paying more at the start but you would have the confidence and security of a permanent, or at least a long-term, working solution.

Pre-developed Assets

An expert is likely to have access to pre-developed code for certain customisations especially if they have:

a) Worked on the CRM platform before
b) Have experience in your industry.

Instead of writing all of the code from scratch, you can work with templates and samples and save time.

Similarly, if your expert knows your legacy system as well as the CRM and has experienced both before, you can save time with data migration trial and error and turn what can be a complicated, laborious process into a positive one that saves time and cost.

Customisations and Integrations

A consultant will be experienced in adding additional customisation or external integrations to a CRM system. Not only that, but they can also gather feedback from users and customers to assess the strengths and weaknesses of each solution and build a long-term plan to tackle such challenges in the future.

For optimal solutions, or to maintain familiarity and ease of use, you may want to integrate third-party applications with your CRM system. You would be in a better position to integrate other apps if your CRM expert can properly guide you with the best options, saving time and resources.

Training and Support

With an expert professional as part of your team, you can create a training programme for your users without hampering their ability to do actual work. Since we and many other experts suggest rolling out CRM adoption in phases, you can prioritise certain departments and CRM functionalities for training and hit the ground running with your CRM onboarding.

" | A CRM's core purpose is to help improve a business' relationship with their customers.

For more
information please visit:
seamlessideas.co.uk