

COLUMNS

What to consider when selecting a new CRM system

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By A LUXURY DAILY COLUMNIST

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In today's mobile world, many employees need access to their tools and company information anytime, anywhere. Gone are the days of the salesperson sitting at his or her desk, making 75 calls a day to hit a quota, unable to accomplish anything at all if he or she steps away from the computer.

Now, whether they are selling building materials, pharmaceuticals or fresh produce, sales representatives need comprehensive, intuitive, connected tools that can be used on any device on the road, in the office or at home.

Feeding the customer need for better service

The drive for a better CRM system is a result of customer demand. After the start of the social revolution that was spawned by the Internet and augmented by the widespread use of smartphones, companies began to want innovative technology that could do more than just prompt phone calls and track sales.

Now that we have access to more information, more people, through more channels, and

are able to do more with mobile devices than ever, our customers are well informed.

Mobile = mandatory

Naturally, since the customer has evolved, sales must evolve, too.

CRM software is integrating with mobile technology to give salespeople many of the same tools on the road as they have at the desk.

Providing the ability to easily access useful information – buying history, contact information and shipping updates – on a mobile device to address customer needs has become critical.

So are tools to connect all devices and applications, collaborate with team members on the fly, enter information such as orders and customer data instantly, receive leads from demand generation systems, and keep track of activities.

But, not all CRM software is created equal.

Organizations need to be prepared when selecting CRM software.

Below are five factors to keep in mind when narrowing down the search for avoiding the trap of signing on for the wrong one:

- Be careful of too many flashy features. CRM software with too many features is actually a bad thing. Salespeople do not want to be overwhelmed by their tools. They want easy access to usable tools and information that gets them closer to the sale faster.
- Affordable mobile is critical. Check available mobile features, integration capabilities with your systems and applications, and social networking services and systems. Compare features versus pricing to ensure that you are getting the most usable solution for your money.
- Who is this going to benefit? Is it good for your company, or good for the customer? It should be good for both.

The purpose of CRM software is to improve the work lives of your employees through simplification and automation, while improving the customer experience through better, faster service.

- Align your CRM strategy with company goals. This important project needs to be implemented like an ongoing journey, with a highly experienced IT leader at the helm, executive buy-in, and alignment with company strategy.

It is a good idea for all the groups that will be using the system to outline its near-term and long-term goals so that the most important of them can be addressed.

Ideally, the solution you choose will be with your company for the long haul, scaling with your growth and expanding with your needs.

- Rollout with users in mind. CRM software capabilities should change as your customer needs change, and as technology advances and employees will need training.

Make a big deal out of this decision. A little internal promotion with executive backing will help with employee buy-in.

CUSTOMERS NOW expect prompt, accurate information, when and how they want it. They want integration, connection, and more control.

If companies cannot deliver, there is surely someone else – just a few taps and swipes away – who can.

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