FIVE RED FLAGS

THAT SIGNAL IT'S TIME TO SWITCH YOUR CRM

With the evolution of online commerce and ease of secure access no matter your location, we are seeing continual improvement to applications with new ones launching almost daily. Features that ten years ago were cutting-edge, are now a standard expectation in most software and industries have revolutionized their products and approaches to the market.

The CRM industry is no different and, today, looks nothing like the original industry that began its evolution in the 1990s.

There are many vendors in the industry today who are able to cater to any business regardless of their size, need, and financial capability, but are lacking severely in terms of innovation. As a result, some older CRM systems lag behind, incapable to offer the newest, yet indispensable functionalities.

Due to this lack of critical functionality and innovation, many companies are reassessing their CRM solution to discover if it is aligned with critical parts of their buyer's journey and overall business needs. The conclusion most companies are drawing is that their CRM solution hasn't kept pace with their organization, creating a gulf between the platform and business initiatives. It's this fact that predicates a need to find a new solution that will not only align to current business needs but grow with them and support changes in the future.

OVERCOMING THE FEAR OF CHANGE

Change can be nerve-racking for anyone but when it comes to business, there's another layer of fear because a single change can ripple through a business affecting more than just a single individual. Changing a central business technology like a CRM raises even more because worries arise due to disruption of sales processes, customer contact records, and other key business details included within the platform.

So, while many businesses know that they need to switch, they assume that it will be too difficult and expensive. There's such a large investment within a CRM that organizations are hesitant because after finding a solution, there's onboarding, training, adoption, implementation, customization, and then third-party add-ons and integrations that also determine the final success of a new CRM platform. There's even additional hesitation when it comes to implementing a new platform with your teams because no one likes a change to their routine and a new CRM can alter someone's day-to-day habits.

No matter which avenue you explore, there seems to be some reason to make you pause. Is it right for your business? Can you implement successfully? Will it work the way you want it to? Will it cost more in the long run?

As a business leader, you know that there is a certain amount of risk involved with business—it's necessary for growth. Part of your leadership will determine where you include that calculated risk and if the risk is worth it. Consider this, if you don't change CRM solutions, how much revenue will you be losing in lost functionality? How many additional budget dollars are you going to have to invest in to assure that you're running at or close to full capacity? What's missing today and is it critical to the future? When weighed, the risk of not adopting a complete CRM solution is equal to the risk of implementing a new system.

Addressing these natural and logical fears is a good place to begin when determining how to move forward.

But remember, it's not your first time doing this either, you had to implement your current CRM solution. You had high hopes for the solution including improving productivity, increasing customer loyalty and relationships, streamlining sales processes, and an increase in revenue. Chances are, you still want these benefits today for your business regardless of how much you've grown and changed since first implementing your current CRM.

Maybe you think that the current shortfalls of your CRM aren't so bad, that you can live with them. The question then becomes how long? When will the legacy CRM system fail that it impacts business negatively? Is that an acceptable risk to your business model?

Or maybe on the other side, you have time left within your current contract with your CRM vendor and don't want to feel like you're throwing that money away. Should you pay for two solutions at once? Will employees get confused?

These questions that you'll ask internally as a business leader are just as important as the information you find outside your company for CRM solutions and they are important conversations to have. There are a number of considerations that need to occur before you switch but it never hurts to begin evaluating different solutions. Ask yourself if you're willing to stick out a failing legacy CRM or ready to implement a CRM solution that fits your business needs now and in the future.

If you're still not sure about making the switch, here are five warning signs to help you determine that it's time to evaluate new CRM solutions. If one or more apply to you and your company, it's a signal that you need to find a better CRM solution or risk interrupting critical business systems and processes.

1 YOU'VE OUTGROWN YOUR CRM

While initially you may have been a small office with a few departments or a limited number of team members that needed access to the CRM, you've now expanded to more team members and possibly, additional locations. As a result, you've needed your CRM to grow with you as your team has grown but it just hasn't seemed to keep pace. Perhaps your company capacity has also grown, with more teams needing access to information held within your CRM platform.

An old CRM may no longer support the new functionalities you need or those available to others on the market. A few signs you've outgrown your CRM are:

Losing customer history
Customer data disappearing? You might be losing critical information as the system purges old data and if over your contact limit or data cap with your current CRM solution.

Reports are manual or outside the CRM
Going outside your CRM solution to find a standard report defeats the purpose of an all-inclusive contact management system. If you're doing reports manually, you aren't saving time or money.

The CRM relies on third-parties to run
If you're putting together third-party solutions to keep your CRM system running, something within the CRM does not fit your needs. Adding on third-party solutions increases your cost and complexity, making the system less user friendly.

Not keeping everything inside the CRM
If you've got data in spreadsheets, the CRM, and email then you're not working effectively. If to easily access information you need to keep it outside the CRM platform, it's time to rethink that solution.

As a result, your database structure becomes outdated with issues syncing data and a decrease in functional capabilities. As the issues grow, integrations with other tools become impossible and your productivity and efficiency suffers throughout the organization. Instead, your daily struggle is with functional work arounds instead of growing your business and meeting your customer demands.

2 DEPLOYMENT AND INTEGRATIONS LACK FLEXIBILITY

As your company grows, new technologies are required to complete everyday business tasks, and to optimize efficiency, they must integrate with the CRM. CRM integrations are common with multiple types of technology, and every business has different needs. Still, if you have a rigid CRM deployment, you may lack the functionality to integrate with other technologies.

A rigid CRM deployment or poor, remote access prevents key integrations and work options. An essential part of a CRM is the ability to centralize and store information, and if your CRM doesn't integrate or the integration is overly expensive, your organization risks lagging behind your competitors.

In today's world, you need to be able to efficiently complete the following with your CRM solution to optimize business:

- Administer the number of CRM users
- Change your existing deployment mode without losing productivity
- Access your CRM remotely and on different devices

Many companies are now global, and if your company has an international branch, it is vital to work via a securely cloud-connected CRM. Having a cloud deployment for your CRM makes it easier for multiple people to work on the same account with real-time information updates but also allows users to access the CRM information regardless of their location but with the same security features. For sales representatives that do fieldwork, they must have access to the most updated information and an easy way to access information such as a mobile application. Having a mobile app isn't enough though, these employees need to be able to access and update data while on the go, having the full CRM available at any time, on any device.

3 THE SYSTEM IS HARD TO USE

When you're struggling to understand a system and have complicated workarounds to get simple tasks completed, it defeats the purpose of having a centralized place for data. If you're wasting time trying to understand a system or deciphering how to pull a standard report, the system lacks a friendly user experience (UX), making you less inclined to do a task. Often, when systems are complex, users can set aside days to input information that they have stored elsewhere because, during conversations with customers, it takes too long to enter the data.

Not only does this waste time and productivity within your organization, but since conversations aren't being recorded in real-time, you're losing critical customer data that could cost your company business either from new or repeat customers. Slow, bulky, complicated, non-intuitive CRM systems with old or bland UIs are doomed to be rejected by users and eventually become obsolete technology within your organization.

Business customers today are coveting a full customer experience, not just a product. Many CRM vendors have realized that a simple, straightforward interface is an added benefit aiding CRM adoption and use. Since CRM technology is essential to business, user interfaces are critical to ensuring that people are using the system. And because as humans, we often judge on appearance, having a well-designed interface also aids user adoption.

If your organization is struggling with the usability of the system, it would be an excellent first step to survey your team to understand their problems with the current CRM solution since they are using the system every day. The results will tell you if it's time to transition to a new CRM to increase both staff satisfaction and usage.

4 THE FEATURES DON'T ALIGN TO YOUR NEEDS

Having a system that suits your needs is vital when choosing a CRM platform, and having too many features is not always good. Why? Too many features can make a system more complex and less user friendly, running into the complexities listed above with UX/UI problems.

Put simply, think about using a digital camera. How many people shoot manually? Sure, a professional photographer might, but the average person is going to shoot in auto-mode where the details are thought of for you rather than controlling it themselves. It's not that users are lazy; it's just that their needs are different when it comes to usage.

This is the same with CRM platforms today; often, companies overestimate their needs in terms of CRM features. A company may think that specific integrations must work with a system, but in reality, that feature only aligns with a small percentage of users. As a result, some features are either not being used or needlessly complicating the simple contact management process.

When you implemented your current CRM solution, some features were absolute musts and others that were nice to have, but how many additional features did you choose after that? Often CRM vendors will push additional features that don't add value to your users but rather to the price tag of the solution. After the implementation of the CRM, you're left with a system with complex features you're paying for but don't use and a more complex solution than needed.

These additional features also have the added strain on your CRM system, creating latency within the system.

5 YOU'RE DOING YOUR OWN SUPPORT

When adopting a CRM system, you and your employees need sufficient and in-depth training. Any CRM vendor should offer hands-on, interactive training that answers user questions when the system is being implemented and support your organization as questions arise. However, often the problem occurs after the sale and the initial support during implementation when users have questions nit the vendor is no longer eager to answer.

If you've ever reached out to your CRM vendor for support and left without a solution, you've probably realized that internally you're your own support team. It makes for a frustrating scenario because you need an answer but cannot get one. Your CRM vendor should be able to support you but can't or won't; this forces you to find your own answers and allocate internal resources to solve the problem.

If something such as a malfunction or bug in the system occurs, it can interrupt your whole organization, and you need support immediately. A CRM vendor should help quickly, without hesitation, to support your organization—if they don't do that, you really should look for a new vendor.

Additionally, your vendor should be providing timely and hassle-free upgrades or performing complex integrations for your current CRM solution (if you aren't sure, check your contract as it should be standard lifecycle). If you need significant changes to your CRM solution, you can request a consultant's service in case you need to customize further, expand, or integrate your CRM with new programs.

If the vendor is not able to give you a roadmap for their plans and is not available for consultations or not offering reliable customer support, then your general productivity may be severely affected.

PREPARING FOR A CRM SWITCH

If, throughout this guide, you've self-diagnosed and found one or more of these red flags that fit your current CRM system, then it's time to act.

Thankfully, moving to a new CRM, it's not as frightening or challenging as you might think. Remember, you're in the driver's seat when it comes to talking with vendors, but it's essential to do some preparation and have conversations before choosing your new vendor. Do your research, find reviews, and find the CRM that aligns best with your business.

Here are a few things you should define when evaluating vendors and before signing a service contract:

- Gather information from employees about the system including feedback and wish lists to align with your organizational goals
- Clearly define missing elements in your current CRM platform and what new functionality you want in a new system
- Redefine the goals for your business, operational improvements needed, and what metrics you'll measure to define success
- Outline which necessary steps you need to cover during CRM buying process and a budget
- Analyze your database, including the structure and content, to identify which elements need to be migrated to a new system (by the way, this is a great opportunity to perform a significant data clean-up).
- Gather quotes, professional advice, and complete trials to ensure fit and usage requirements

Once carefully selected, the right solution will bring the benefits that you originally envisioned for your business. Find the best CRM solution for your business because everyone deserves a CRM solution.

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