Top five things to consider when choosing a CRM System in 2022

INTRODUCTION

A CRM system touches every part of your business. It is one of the most critical enablers of your business growth: So, selecting the right one for you is something that deserves careful consideration. If you are looking to upgrade your CRM capabilities, here are five things that should guide your thinking together with a brief look at the solutions to these challenges.
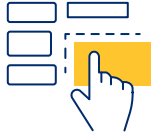
Ease of use

Low adoption is the biggest single reason why CRM implementations fail. This could result from one of several different reasons. The selected software may be insufficiently flexible to adapt to your unique sales process; it may require salespeople to scroll through lots of pages to get to the information they need; or it may be that it was simply foisted upon the sales team as a fait accompli with no investment in change management. (This blog has further detail on this topic).

Overall, purchasing a clunky user system that imposes an admin burden on sales and marketing teams is the one mistake you really need to avoid making. Even the best CRM system is a wasted investment if nobody uses it.

+ You need to ensure that your CRM system will allow you to re-create your business processes using its software, not imposing its processes upon your teams. Modular, customizable software that not only allows you to design processes your way, but to amend them as circumstances change, is vital.

+ A portal approach can enable your team members to view only the information they need, rather than wading through lots of irrelevant data.

+ Giving people the option to edit their screens to align with their personal priorities will also enhance the usability of the system.

"Zoho is efficient, elegant and smarter than its counterpart in a lot of ways. The ease of implementation throughout an entire organization's infrastructure through integration with other software has amalgamated the various departments in such a fluid manner."

**Prashant Choudhary, Business Development Manager,
Emtex Engineering Private Limited**

ZOHO CRM for Enterprise

Data Privacy

GDPR (the EU's General Data Protection Regulation) and CCPA (the Californian Consumer Protection Act) are raising the bar for privacy legislation. These are likely to spur the implementation of similar legislation in other geographies. In the US, for example, at least 38 states introduced more than 160 consumer privacy related bills in 2021 (compared to 30 states in 2020 and 25 in 2019).

And consumers are now taking the fight to the tech giants that aggressively monetize their data without their knowledge or consent. For example, a recent survey suggested that 71% of US citizens believe the information gathered from digital interactions benefits only the company, not the consumer.

You therefore need to ensure that your data privacy policies respect both the letter and the spirit of the regulations – those in place today and those that will be implemented over the coming years. It must not only be compliant but allow you to manage your customers' data in the ethical manner they increasingly expect from you.

+ Ensure your CRM vendor is adopting a 'Privacy by Design' approach. This ensures that product initiatives that don't meet the threshold for data privacy never make it to the development stage. This will ensure that privacy is built-in, not bolted on.

+ Investigate the extent to which your CRM vendor uses cookies and trackers to monetize the customer data running over its systems. Many CRM vendors are harvesting data far beyond what is needed to ensure the effective operation of the software.

+ Look at the underlying security of the system's architecture – a CRM system built up over years through acquisitions creates multiple points of vulnerability. You should consider where your data is being hosted: There have been recent examples of data breaches occurring through the CRM vendor's use of public cloud. These breaches can result not only in fines, but in reputational damage that may prove even more costly in the long run.

ZOHO CRM for **Enterprise**

Cost

Cost shouldn't be your sole consideration when buying a new CRM system – but it would be naïve to think that it won't have some influence on the purchase decision. Today, most CRM software is sold on a Software-as-a-Service model with straightforward 'per-user per-month' pricing which makes direct cost comparisons transparent.

However – to an extent – you get what you pay for: more expensive systems tend to offer greater functionality – so you need to have a clear understanding of the precise capabilities you are looking for. The freemium approach (software provided free but with limited functionality and for a small number of users) is a good choice for small companies starting out on their CRM journey or larger organizations looking to 'try before they buy'. You also need to take a view of the lifetime costs of owning the software.

+ You need to assess the per seat costs of the software (which can range from completely free to several hundred dollars a month) versus the functionality that is delivered. Are you required to buy a lot of unnecessary 'bells and whistles' to get the functionality you need?

+ Look at implementation and upgrade costs. Do you need to employ an army of coders to create the system you need? Is there a requirement for ongoing support from the vendor or their implementation partner? Has the vendor embraced a LCNC (Low Code/No Code) approach that minimizes your reliance on expensive contractors?

+ If you ever part ways with your CRM vendor, is it easy to migrate to a new system? Or are you stuck with expensive legacy technology that delivers little in the way of value?

ZOHO CRM for **Enterprise**

Speed

When it comes to CRM implementation, there are some necessary up-front time investments (stakeholder engagement and system design) that will pay for themselves many times over – if these steps are skipped, the result is a botched implementation that will result in low functionality and poor adoption. Equally, a CRM system announced with great fanfare that is still in development six months later will lose momentum; and the longer the implementation, the more problems are likely to arise.

So, you need to find the balance between doing it right and doing it quickly.

> "The launch of Zoho CRM is one of TAFE's significant initiatives to drive digital transformation and growth. Zoho's solution is very innovative and truly digital. A CRM deployment of this magnitude would normally require 18 to 24 months, but the TAFE and Zoho teams completed this project in an astounding six months."
>
> **Shobhana Ravi, Chief IT, Innovation, and Learning Officer, TAFE**

+ The longer the implementation takes, the more likely it is that the conditions for which it was initially designed will have changed, meaning that your 'new' CRM system is redundant from the moment it is launched.

+ The prototype system will be developed using data that is out of date at 'go-live' – the longer the implementation period, the trickier the migration and data reconciliation. If the data is not up to date at launch, then users will default to previous processes and the new CRM system will be ignored.

+ Many organizations will want to see that the system they have invested in is quickly generating ROI (and preferably in the same financial year).

+ Many organizations are embracing the Agile approach to complete projects quickly, but many CRMs aren't yet set up to support it. If your company has Agile teams, is your CRM aligned with that process or are your employees compensating for an ill-fitting system?

ZOHO **CRM** for **Enterprise**

A Unified Modular Platform

Many CRM systems are 'Frankenstein's Monsters', constructed from a series of acquisitions over many years – this results in the 'bloatware' phenomenon in which lots of superfluous capabilities make integration difficult and slow down system performance. As we've seen, this also introduces security vulnerabilities.

These systems can also be very difficult to customize, requiring both highly specialized technical skills and a detailed understanding of your own unique business requirements – a resource that might be hard to find and expensive to recruit and train.

+ A unified modular platform avoids these problems. By providing a single stack built on a common code base, each component works together seamlessly. Ideally, your chosen CRM partner will also be part of an ecosystem of developers and implementation partners that have already created modules for most of the challenges you are likely to face.

+ A modular approach means that individual 'Lego bricks' can be quickly assembled into unique configurations that address individual needs. Pre-built modules allow for rapid implementation whilst also providing the ability for these to be customized to align with your sales processes – without resulting in unmanageable complexity.

ZOHO CRM for Enterprise
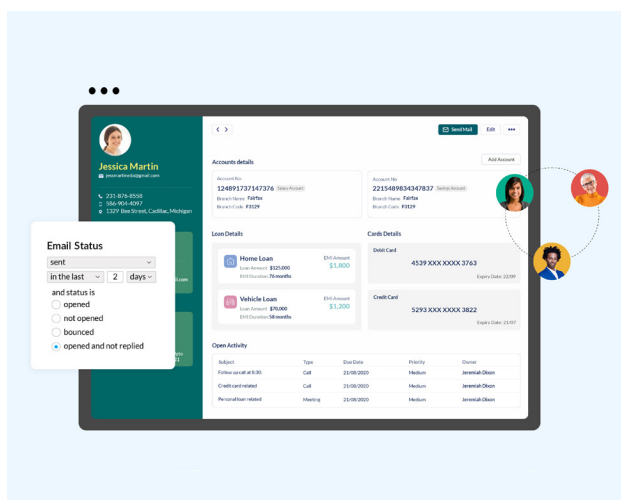
CONCLUSION

With CRM, the clue is very much in the name – it's all about managing customer relationships successfully.

You need to be able to both acquire customers and to retain them across the many phases of their business growth. That means developing meaningful relationships that will maximize the lifetime value of those customers to your organization.

Today customers expect their vendors to be able to provide customized communications and offers that align with their individual needs. As we move into the cookieless world, you can only deliver these personalized services by 'joining the dots' of your first-party data – regardless of the system in which they happen to reside.

Each of these issues is critical to your success. And they are all core to CRM. So, your choice of system is fundamental to your future success as an organization. But making the wrong choice will mean that you are stuck with a 'solution' that simply isn't fit-for-purpose. Giving due consideration to the issues above will ensure that you have an asset – not an albatross.

For more information

Visit zohocrm.com

ZOHO **CRM** for **Enterprise**   **Simply different CRM**