TIPS FOR CHOOSING THE RIGHT

CRM SYSTEM FOR YOUR BUSINESS

Article from Revalsys Technologies

This article explains about the tips for choosing the right CRM system for a business

A CRM system is software that automates the process of keeping track of your customer data and eliminates the need for you to maintain and update it manually in excel sheets. However, choosing a CRM is a tough task. When done without proper research, it can cause you heavy financial losses. The best CRM may not be ideal for you, and returning it is not easy.

To simplify the selection for you, here we have listed some tips to pick the right CRM:

Know Your Goals

To find the right CRM system for your organisation, you should take your business processes and needs into consideration. A CRM is not a one-stop solution for all kinds of organisational issues. The problems that your organisation faces will dictate your requirements from the software. Think about what you would like for it to accomplish for your organisation, and whether you need it for the whole organisation or just a few of its departments. Have a discussion with your team members about their issues to understand how a CRM can improve their efficiency and productivity while serving your customers and to increase your sales.

Identify The Required Features

One size does not fit all businesses when it comes to a CRM plan. Every business has unique processes and customer base. A basic CRM system won't suffice all businesses. The software should offer you flexibility – it should grow with your business. You should also be careful not to choose a CRM that has features that you don't need, as it will require you to unnecessarily pay more money.

Ensure Integration With Other Applications

A CRM system is not an addition to your business's software and technology. It can help you to streamline your business processes. Check how effectively your target CRM can work with your business's existing applications. For example, when integrated with your work calendar, it will send you reminders for your upcoming tasks. Integrating it with your social media accounts will provide you an insight into your social media activity in one place, like the number of interactions, new followers, user demographics, etc. On your website, you can use it to know the number of visits on each page, maintain customer data, monitor their buying behaviour, etc.

Ask For A Free Trial And A Live Demo

Get a feel of your preferred CRM before you buy it. Get its live demo to check if it has all the features that you need. Check for its ease of use and if it allows your business to grow. Before you go ahead with a CRM make sure to consider the opinions of your team members and then go for its free trial version. If you and your team are happy with it at the end of the trial period you can shift to its paid version, and if not then opt out of it easily.

Pick A Vendor With Relevant Industry Experience

Different CRM systems are developed with features that are unique and relevant to different industries. You should look for a CRM vendor that has experience in your industry. You can check your target vendors' portfolios on their websites to know if they have worked with similar industries as yours.

Prioritise User Experience

The most important aspect of a CRM system is its user-friendliness. When you look for a CRM, you should check for its ease of use and interface. It should take users as few clicks as possible to complete their tasks on the software. It should also be able to receive and handle customer interactions and queries from multiple channels like your website and social media accounts in real time.

Consider The Cost

The greater the number of features you want from a CRM system, the more you will have to pay for it. The cost of the software varies from vendor to vendor and depends on its number of users and features. The best way to look for a vendor is to budget for only the most important features of the software and steer clear of the bells and whistles.

Ensure Mobile-Friendliness

If you are not available for your customers on their preferred platforms, you could lose them for good. They are becoming increasingly mobile, and sales reps are also required to spend most part of their days travelling and need on-the-go access to customer data, so a CRM needs to be mobile too. There is a wide range of mobile devices available today from smartphones and tablets to laptops. Make sure your vendor offers you compatibility for all these devices.

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