

10X more productive series

# CRM SOFTWARE EVALUATION TEMPLATE

Find your CRM match with this easy-to-use template.



# How To Use This Template

Investing in the right CRM solution will help increase your revenue, cut your operating costs, and boost IT efficiencies, but with many options available to you, what selection criteria should you use to make the right decision for you and your company?

Knowing that not all CRM solutions are created equal, this template is designed to help you select the right CRM for your business.

To use this template:

## Step 1: Select 2-4 CRM vendors you want to evaluate:

|   | CRM Vendor Name   |
|---|---|
| 1 | Base, <a href="https://getbase.com">https://getbase.com</a> |
| 2 |   |
| 3 |   |
| 4 |   |

## Step 2: Read each chapter and provide a score for each vendor based on the descriptions below:

| Score | Description                     |
|-------|---------------------------------|
| 4     | Goes above and beyond our needs |
| 3     | Meets our needs                 |
| 2     | May not meet our needs          |
| 1     | Does not meet our needs         |
| 0     | Does not apply                  |

**Step 3. Fill out the score card below to receive a total score for each CRM vendor. Consider the vendors with the highest scores.**

| <b>VENDOR</b>           | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> |
|-------------------------|----------|----------|----------|----------|
| <b>Annual Cost</b>      |          |          |          |          |
| <b>Implementation</b>   |          |          |          |          |
| <b>Mobility</b>         |          |          |          |          |
| <b>Intergration</b>     |          |          |          |          |
| <b>Metrics/Insights</b> |          |          |          |          |
| <b>Adoption</b>         |          |          |          |          |
| <b>Automation</b>       |          |          |          |          |
| <b>Scalability</b>      |          |          |          |          |
| <b>Customizability</b>  |          |          |          |          |
| <b>Data Access</b>      |          |          |          |          |
| <b>Customer Support</b> |          |          |          |          |
| <b>Total</b>            |          |          |          |          |

# 1

## Why do you want a CRM?

Before you dive in, it's important to understand **why** your business wants a CRM in the first place. It's important to keep in mind that CRM is as much about how you approach and relate to your customers as what software you use to keep track of them. A well planned CRM strategy coupled with the right technology is very powerful - but what goals do you want to achieve through CRM?

- Is it to centralize your business and make you more organized?
- Is it to produce powerful sales and business insights that will make you more profitable?
- Is it to have a history of your contacts, leads, deals and conversations?
- Is it to scale your operation and make you more productive?

Whatever your goals are, write them down. It will keep you grounded throughout the selection process and remind you why you're investing in CRM software in the first place. You will also be able to better evaluate your options if you know what your end goals are.

# CRM Goals

# 2

## What is the annual cost of the CRM?

Alright, now that we've established that you do in fact have good reason to invest in a CRM, we're cutting right to the chase. While cost shouldn't be the only consideration when you're shopping for a CRM, it's important to know if you can actually afford the CRM services you're evaluating.

SaaS CRM systems are ideal because they typically don't require a development fee up front, and allow you to pay on a per month basis so you can monitor your cash flow.

SaaS translates to *software as a service*. SaaS allows subscribers to access software applications without investing in servers or paying licensing fees. Everything is included in the subscription fee, including software updates and upgrades. Using an SaaS service makes administration easier; provides automatic updates and patch management; ensures compatibility; enhances collaboration and provides access to users from any device capable of accessing the internet.

So here's how to calculate your total annual cost:

**Number of Users x Cost per Month = Annual Cost**

First you need to figure out how many people in your company will be using the CRM, then visit the company you're evaluating's website to figure out their subscription fee per month - or call the company directly.

## Score Card

Write down the annual cost for each CRM vendor you're evaluating so you can reference cost projections at the end. Also, give each vendor a score based on your budget. A score legend for ratings 0-4 can be found on page 2.

| Vendor | Annual Cost | Affordability Score (0-4) |
|--------|-------------|---------------------------|
| 1      |             |                           |
| 2      |             |                           |
| 3      |             |                           |
| 4      |             |                           |

# 3

## How long does the CRM take to implement?

How soon do you want or need to have your CRM up and running? Some CRM systems take a lot longer to implement than others. What good is a CRM that you have to wait nearly a year to use? Be sure to ask your CRM vendor how long they expect implementation to take. Don't forget to account for your own office politics, busy seasons and other events that may get in the way of a timely implementation and adoption. Remember, your job isn't done when the CRM is working, it's done when your team is actually using it.

Geoffrey James, a popular sales writer at Inc.com shared [12 rules for a successful CRM implementation](#). He offers some great tips for ensuring your CRM implementation is successful.

### **Does it cost anything extra to implement?**

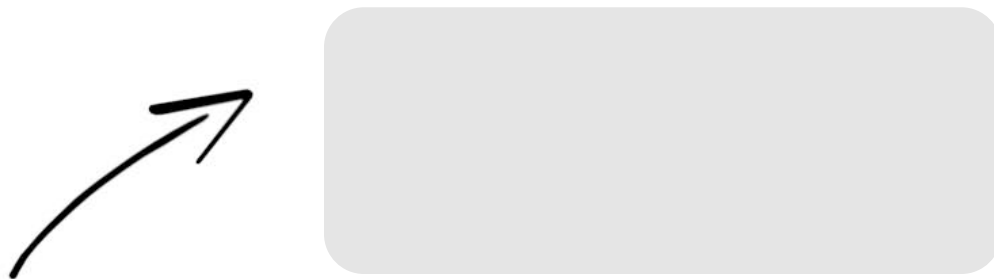
Some CRM systems cost extra to implement, while some are easy to set up and don't require any extra implementation costs. These kinds of implementations are frictionless and typically are preferred. Most vendors don't offer implementation services at all, and will typically refer new customers to one or more third party implementation specialists. For companies of all sizes, but especially with small businesses and startups,



avoid expensive CRM implementations. You can find great solutions that are free and or cheap to implement.

### **Score Card**

Write down the date that you want to have your CRM fully implemented - consider implementation costs and possible roadblocks.



| Vendor | Implementation Score (0-4) |
|--------|----------------------------|
| 1      |                            |
| 2      |                            |
| 3      |                            |
| 4      |                            |

# 4

## How important is mobility to your team?

A CRM that works when you're sitting at your desk won't necessarily work anywhere, like in the field, or on a plane. **Mobility is a key-driver for CRM selection** so you can make sure the experience is seamless from desktop to mobile.

When shopping for a CRM, look for the solution that meets your team's needs, no matter where they are. Look for a system that is easy to access on a plane, from the office, in the field, or even offline. A CRM that is accessible in the situation relevant to a rep's work makes all the difference to user adoption.

- Does the CRM offer native mobile applications for iOS, Android and Windows?
- Is the experience between desktop and mobile seamless?
- Does the CRM automatically sync ensuring that information is up to date at all times?
- Does the CRM have off-line functionality?

## Score Card

Evaluate the importance of mobility to your business against each CRM vendor below.

| Vendor | Mobility Score (0-4) |
|--------|----------------------|
| 1      |                      |
| 2      |                      |
| 3      |                      |
| 4      |                      |

# 5

## Does it integrate with the tools you already use?

CRM isn't the only software your company uses. Select a CRM that integrates with the tools your company already uses, making it a flexible partner for all of your responsibilities. Here are some key considerations:

1. What email marketing tools does the CRM integrate with?
2. Does it offer social media integrations?
3. What about document storage like Dropbox and Google Drive?
4. Can you attach or create invoices, proposals and sales quotes?
5. What are the key tools or programs you need the CRM to work with?

It's important to know which integrations are non-negotiable for your business. Make sure the CRM you choose is able to connect with your tool of choice, or that it at least offers a comparable substitute.

## Score Card

Based on the integrations your team needs, rate the CRM vendors based on their integration options as well as ease of integration.

| Vendor | Integration Score (0-4) |
|--------|-------------------------|
| 1      |                         |
| 2      |                         |
| 3      |                         |
| 4      |                         |

# 6

## Does it provide the reports/ insights management needs?

The data that you can glean from a CRM system is only as good as the data entered. If only half of your team is using your CRM, how good is your data? Think about what metrics you as the manager need to see – and make sure the CRM you choose will readily provide you with those insights. Some important reports to look out for include:

**Sales Funnel Analysis** – The sales funnel analysis report tells you where your team stands at all points in your pipeline and what your business has to lose or gain.

**Incoming Deals Volume Report** – This report breaks down the number of deals registered over a period of time and percentage of total deal count.

**Sales Forecasting** – The sales forecasting report will tell you the total value of all deals in the pipeline and how much of that amount your business can realistically expect to bring in.

**Sales Revenue Goals** – Set and monitor individual and team revenue goals over a set time period.

**Won Deals** – This report tells you the number of deals won, by team member, over any resolution period you choose.

## Score Card

After you think about what insights you need to see from your CRM, provide a score to each CRM vendor based on their out-of-the-box reporting options.

| Vendor | Metrics Score<br>(0-4) |
|--------|------------------------|
| 1      |                        |
| 2      |                        |
| 3      |                        |
| 4      |                        |

# 7

## Will your team actually use it?

### “100% adoption or nothing”

SaaS-based CRM sales will grow to \$6.3B by 2015. With so much money being invested in CRM, it's time to address an alarming concern that could hinder your CRM strategy— a low adoption rate. Look for a CRM solution that promotes user adoption. Find a CRM partner who minimizes friction so your team will actually use it.

Start by evaluating these 3 factors to gauge adoption:

#### **Mobility**

How many sales people do you know who only work when they're at their office using their desktop computer? When shopping for a CRM, look for the solution that meets your team's needs, no matter where they are. A CRM that is accessible in the situations relevant to a person's work makes all the difference to user adoption.

#### **Zero Input**

While the data in your CRM system is valuable, it's not so valuable that entering the data should be more important than the selling that creates the data. As much as possible, automate tasks like call logging, email sync, and tasks. Don't turn your top salespeople into typists.



## U/X

No one wants to work with a confusing CRM with too many required fields. CRMs are intended to produce profits. Not by virtue of their very existence, but because they make the sales cycle smooth and they track the tasks and data relevant to closing deals. Look for the CRM with a great UX that automates tasks when possible and pushes reminders to your mobile phone.

If you're looking for more tips to help achieve 100% adoption, [this is a great place to start.](#)

## Score Card

Provide each CRM vendor with a score based on which one best promotes user adoption.

| Vendor | Adoption Score (0-4) |
|--------|----------------------|
| 1      |                      |
| 2      |                      |
| 3      |                      |
| 4      |                      |



# 8

## How well does it automate for you?

Continuing on the theme from Chapter 7, make sure adoption is not a problem with your CRM. One way to mitigate the adoption risk, is to make sure the CRM system you choose is able to automate certain tasks, reducing redundancy and helping your team actually use it.

### **Call Logging**

It's a huge time suck to take notes on a phone call, only to have to then type it into your CRM system later. Look for a CRM that allows you to call your contacts, leads, and deals directly from the web or mobile application. Some CRM's allow you to set up a dedicated line for each user so that customer calls can be taken directly in the CRM. What about call recording? Laws vary state by state, but some CRM systems have built in recording functionality so that you can refer back to important conversations.

### **Task Reminders**

You're busy and you need help staying on top of everything. That's why you're investing in a CRM in the first place, right? Find a CRM that allows you to collaborate with your team by assigning tasks and setting due dates for those tasks.

## **Email Automation**

You're likely already emailing in an external platform like Outlook or Gmail. Look for a CRM that offers complete email integration so that you can save time by automatically connecting all relevant emails to contacts, leads and deals.

## **Score Card**

Score potential CRM vendors on how well they automate tasks.

| <b>Vendor</b> | <b>Automation Score (0-4)</b> |
|---------------|-------------------------------|
| 1             |                               |
| 2             |                               |
| 3             |                               |
| 4             |                               |

# 9

## Will it grow with you?

If your business is for-profit, you should be thinking about how a CRM solution can scale with you. You don't want to have to go through this whole process again in a year, do you?

Businesses of all sizes have customers to manage, sales to track and teams to coordinate. You need a CRM solution that is simple to implement and use, yet intelligent and powerful enough to benefit your bottom line and grow with you.

Here are some things to consider:

**Permissions:** Does the CRM offer state of the art user permissions and team management? If your team is large - or very structured - you're going to want to assign different permission sets to different users. For example, your reps want to focus on customer data most relevant to their business (and commission check), whereas managers may need to see data for all members of their team. Look for a CRM that allows you to assign visibility to individuals, teams, superiors, divisions - you name it.

**Geolocation:** Some modern CRM's offer geolocation functionality, which allows you to visualize your contacts, leads, and deals on a map and reach them with one-touch driving directions. As a sales manager, you'll have greater insight into your market segmentation. How do you know if you need to hire an additional sales manager for the Midwest? You can view

the number of accounts by territory versus the number of sales managers to decide how to best service your customers.

**Cost to Grow:** Just because a CRM works for your company today, doesn't mean it will be a fit in 1, or 5 years. Think about how a CRM will scale as your business grows. Can the tool serve companies of any size? As you make your final decision, look for a CRM that will be a long-term partner.

### **Score Card**

Score potential CRM vendors on how well they will scale with you.

| Vendor | Scalability Score (0-4) |
|--------|-------------------------|
| 1      |                         |
| 2      |                         |
| 3      |                         |
| 4      |                         |

# 10

## Is it easy to customize to your business?

Your business is unique. Make sure the CRM you choose can adapt. The sales cycle of a real estate agent is different than the sales cycle of a creative agency, for example. Look for a CRM that allows you to customize your sales stages and add custom fields, filters and tags so it makes sense for your business.

### **Sales Stages**

Look for a CRM solution that also offers fully customizable lead tracking and sales stages. Using the real estate vs. creative agency example from above, if you were the New Business Development Director at Creative Agency XYZ, you wouldn't choose a real estate specific CRM because you want to map your sales cycle in a way that makes sense to your business.

### **Filter and Sort**

You often need to pull batches of customers using variables other than company or name. Filtering is the feature you employ to define search criteria and conduct your CRM search. Filters are the data points your CRM uses to get you the information you need. Sorting determines the order search results are presented in.

## Score Card

Score potential CRM vendors on how easily it can customize to your business.

| Vendor | Customizability Score (0-4) |
|--------|-----------------------------|
| 1      |                             |
| 2      |                             |
| 3      |                             |
| 4      |                             |



# 11

## Can you easily import and export your data?

If you're already using a CRM system and you're looking to change vendors, a big concern is how are you going to get your data out of one system and into another.

Since data is such an important business asset, this consideration cannot be overlooked. Here are some key considerations:

- Do you need your IT department to import and export data - or can users complete this process themselves?
- Can you run your current system and the system you're switching to in parallel?
- How well does the company document the import/export process?

## Score Card

Score potential CRM vendors on how easy it is to work with your data.

| Vendor | Data Access Score (0-4) |
|--------|-------------------------|
| 1      |                         |
| 2      |                         |
| 3      |                         |
| 4      |                         |

# 12

## Will you receive the customer support you need?

It's important to remember that when you're selecting a CRM, you're not only selecting a product, you're selecting a partner. How would you rate your interactions with each company you are evaluating? What is their customer service and support options like after you're up and running? Some companies may try to give you the hard sell, only to neglect you once you're actually a customer. Be sure you're selecting the right partner who will show you the light to CRM success.

### Score Card

Score potential CRM vendors on quality of their customer support.

| Vendor | Customer Support Score (0-4) |
|--------|------------------------------|
| 1      |                              |
| 2      |                              |
| 3      |                              |
| 4      |                              |

# 13

## Meet Base

We hope you found this free template useful. You're well on your way to finding the right CRM for you. In your search, don't forget to add Base to your short list.

Base CRM, the future of CRM, is an intuitive, easy-to-use tool that takes just minutes to set up.

Inspired? To learn more, go to <https://getbase.com/imagine/> to schedule a demo or sign up for a free trial.



The CRM your team will actually want to use.

