



Questions to address while reviewing CRM software

Conducting a CRM needs assessment doesn't have to be hard or intimidating. Sage Software has put together the 'top 10' (plus one) list of things you'll want to understand from each CRM vendor as you move through the needs assessment process.

1. Ease of Use -

- a. **Ensure you Understand** – A CRM system is only as good as the people using it. Ease of navigation, multiple ways to access data, fast search and data placement are very important to usability of the system.
 - i. Can you click back and forward through recently visited pages in the system?
 - ii. Can you select recently viewed company, contact, opportunity, support and lead pages from a drop down list for quick reference?
 - iii. Is the product running in a browser interface that my employees are already familiar and comfortable with using?
 - iv. Can users setup their personal preferences for they way they like to work or does everyone have to use the exact same interface and workflow?
- b. **Why it is important** – Complex systems that attempt to place all possible information on one page and are difficult for the end user to navigate reduce the end user adoption rate and, consequently, "top down commitment" is compromised.
- c. **How does Sage CRM do it** – Sage CRM places data in organized tabs and pages. When information is selected the pages are "turned" rather than launching new web pages, which makes it impossible to retrace your steps as you navigate through the system. Quick reference lists, back and forward buttons, and multiple search screens are easily accessible. User preferences and a home page are personally designed so employees see and work the way they prefer to.

2. Rapid Deployment/Cost Effectiveness -

- a. **Ensure you Understand** – In order to reap the benefits of CRM quickly, you need to ensure that the system you purchase can be deployed quickly and cost effectively. Client/Server CRM software will have to be installed on every user you are providing access to the system. Vendors need to be clear on exactly what will be implemented including customizations and specifically when the system will be ready to use.
 - i. Can you provide us implementation quotes for plain, medium customization and major customized systems (ballpark of course)?
 - ii. How many servers are required to deploy your system?
 - iii. Do we have to install software on each client desktop?
 - iv. What if we upgrade or customize the system do we have to reinstall on each client desktop?
- b. **Why it is important** – The faster the CRM technology is implemented the faster your company gets the benefits and starts to see rewards. If this can all be accomplished through a rapid deployment, it is cost effective two-fold.
- c. **How CRM does it** – Sage CRM is installed on a central set of server(s) and accessed through an internet browser. Once the CRM system is installed users have immediate access to the system, NO client software is necessary. This also applies to customizing and upgrading the system. This drastically reduces the time and cost to deploy the software.



3. Flexibility and Customizability -

- a. **Ensure you Understand** – No CRM System is used the same by two companies, even if in the same industry. The system you are purchasing must be flexible enough to mold to your companies needs, and continue to grow.
 - i. Do you have any limitations to the number of fields, tables, scripts, tabs, etc that we can add to the system (hard disk size notwithstanding)?
 - ii. Can you customize the system and provide all users immediate access to the customizations?
 - iii. Can you demonstrate how flexible and easy to use your products workflow capabilities are?
 - iv. Can you demonstrate how to add a field to the system?
- b. **Why it is important** – To ensure employees enjoy and use the system it must be flexible enough to quickly and easily change the screen terms (even use industry specific terminology), drop down lists and add fields, tables, scripts and tabs specific to your company's unique needs. Workflow must be easy to implement and flexible enough to adjust with your changing business processes.
- c. **How CRM does it** – Sage CRM provides built-in utilities to add fields, tables, scripts and tabs to the system quickly. An Icon driven workflow allows for drag and drop setup and allows you to configure alerts, emails, tasks, and more to be triggered by actions in the system. Sage CRM becomes each employee's personal assistant constantly performing tasks that today are falling through the cracks.

4. Operational Systems Integration -

- a. **Ensure you Understand** - How well integrated the CRM system is with the operational and order management systems. Is it partially integrated, or do you have 100% of the functionality available to you?
 - i. Do you integrate to an operational order entry and inventory system?
 - ii. Is it partially integrated or do you have 100% of the order entry functionality available to you?
 - iii. Can you enter an order or quote through the CRM solution directly into the back office database without data synchronization?
 - iv. Can you view inventory items, quantities available, and item location details real time from within the CRM system?
- b. **Why it is important** – If a system does not provide you real time information and full access to the operational then you will have to pay for integration to the pieces that are missing, or deal with incorrect data waiting for batch processing or synchronization.
- c. **How CRM does it** - Sage CRM delivers unmatched integration with Sage ACCPAC Advantage and Pro Series. The integration enables the CRM user to launch the entire order entry module within the CRM solution in a browser. This allows you to decide which order processing features your company will use without any additional cost or time to integrate.

5. Anytime, Anywhere Access -

- a. **Ensure you Understand** A CRM solution must be easily accessible in multiple ways. Support for remote and wireless access is critical to keeping employees in the loop.
 - i. Can you access the system from any location (with an internet connection) without loading any software on the machine?
 - ii. How will our remote offices access our main database?
 - iii. Will our field-sales staff have access to the central database in real time?
 - iv. Do we have to install servers at each of our remote sites and synchronize data manually?
 - v. I would like to demonstrate your software from my home machine, can you provide me access to a demo site or do I have to install software?



- b. **Why it is important** – The ability to access customer data in real time whether from a desktop computer or handheld device gives employees access to all information as soon as it is entered into the CRM system. Leads, escalations, support cases even alerts and reminders are accessed immediately. If a system relies on synchronization to update databases vital information is not reaching all employees as soon as it is entered into the system. This lag time can cost the company money and customers because all employees are not on the same page.
 - c. **How CRM does it** - Sage CRM is 100% Web-Based solution meaning all information is maintained on a central server and accessed from anywhere at anytime through the internet or an intranet. Sage CRM also has remote client and wireless client access options.
6. **Scalability** -

 - a. **Ensure you Understand** – A CRM system must be able to grow with your business. Understand how much that growth will cost your company.

 - i. Can you add users to the system without having to install software?
 - ii. Can you add functionality (i.e. Marketing, Support) without having to reinstall software?
 - iii. Can you customize the system and provide all users immediate access to the customizations without having to reinstall software?
 - iv. What if we upgrade the system do we have to reinstall on each client desktop?
 - b. **Why it is important** – By selecting the right technology you are reducing the amount of time and money it takes to grow your system. When deciding on a CRM system think not of just what it costs now but how much is it going to cost us long term? Scalability of a system must be a major factor in the decision making process
 - c. **How CRM does it** – Sage CRM is installed on a central server and accessed via the intranet, internet or LAN. In order to add users, or functionality an activation code simply needs to be updated in the system and the new users or functions are available immediately. Customizations are performed on the central servers and when complete (system goes live) all users have access to the customizations right away, no client software is required.
7. **Complete CRM Solution** -

 - a. **Ensure you Understand** – It is important since CRM is designed to open communications between departments, employees, partners and customers that the system be designed and a “complete” CRM system Sales, marketing, Customer support, contact and task management all designed from the ground up on the same platform with the same development team.

 - i. Can the sales team see support team’s issues and vice versa? If yes, what are the limitations?
 - ii. Can the marketing team see orders and revenue generated from various campaigns?
 - iii. Can the marketing team generate a list of clients that purchased a particular inventory item (red widgets) and send an email blast to those clients offering a promotion?
 - iv. Can the sales team see customer credit information in real time from the accounting solution?
 - b. **Why it is important** – If the system was not designed from the ground up vendors are taking different technologies written by different development groups and integrating them together in pieces. This type of solution can be difficult to navigate and extremely complicated because the same goals were not established and designed into these systems.



- c. **How CRM does it** - Sage CRM was built from the ground up with a complete end to end CRM solution in mind. Sales, Marketing, Customer Care, Contact and task management were all designed and developed internally by Sage Software. .
8. **Financial Systems Integration -**
- a. **Ensure you Understand** - How well integrated the CRM system is with the financial and accounting systems. Is it partially integrated or do you have 100% of the back office functionality available to you.
 - i. Do you integrate to an accounting solution?
 - ii. Is it partially integrated or do you have 100% of the back office functionality available to you?
 - iii. Can you enter an order into the back office database without data synchronization?
 - iv. Can you view inventory items, quantities available, and item location details real time from within the CRM system?
 - b. **Why it is important** – If a system does not provide you real time information and full access to the operational then you will have to pay for integration to the pieces that are missing, or deal with incorrect data waiting for batch processing or synchronization.
 - c. - Sage CRM delivers unmatched integration with Sage ACCPAC Advantage and Pro Series. The integration enables the CRM user to launch the entire order entry module within the CRM solution in a browser. This allows you to decide which order processing features your company will use without any additional cost or time to integrate.
9. **Microsoft Office Integration-**
- a. **Ensure you Understand** – How well does a CRM system integrate with the other front office applications that you run in house? Since Microsoft Office, is the industry standard, it is important to note the level of integration between CRM and all MS Office products.
 - i. Can I send an email from Outlook and store the email directly in the CRM solution without manual intervention?
 - ii. Does your system integrate to Microsoft Word and Microsoft Excel out of the box?
 - iii. Can I mail merge quotes and marketing activities through the CRM?
 - iv. Can export or copy and paste reports into excel?
 - v. Can I view calendars, create tasks and appointments for Exchange/Outlook clients from the CRM solution?
 - b. **Why it is important** – Few companies exist today without the use of some of Microsoft Office tools in their front office. Integration to email and Microsoft Exchange is especially important because it offers you choices, rather than limiting you to Vendor specific email client and not allowing your employees to use their familiar Outlook calendars.
 - c. **How CRM does it** - Sage CRM provides bi-directional integration to MS Exchange allowing access to calendars, tasks and appointments for non-CRM users. Integration to MS Word and Excel is standard in the solution and mail-merging, exporting reports and more are all supported out of the box with Sage CRM.
10. **Open Architecture -**
- a. **Ensure you Understand** – The system you are purchasing should have the ability to grow with your company and technology. This platform should provide the ability to link to ADO, ODBC compliant databases and other software you may have or purchase going forward. The system should be built on an adaptive technology not legacy or older proprietary software.
 - i. Can we integrate to multiple databases with your solution?
 - ii. If so, what are the limitations in doing so?



- iii. Do you have any limitations to the number of fields, tables, scripts or tabs we can add to the system?
 - iv. Can customizations be done using utilities in the system, or do you need to do them in SQL or your proprietary database?
 - v. Would you quickly add a field to the existing database for us, and show how you would put a trigger or SQL script behind it?
- b. **Why it is important** – The objective of CRM is to bring all of your employees AND systems together to one central repository of information. If the technology does not provide you the open architecture to easily and quickly integrate to other systems you may find yourself evaluating a new system in a short period.
- c. **How CRM does it** – Sage CRM is written in java and leverages leading web technologies and industry standards. Sage CRM is designed to run on the web and provides the open, Web Services architecture to integrate to a wide variety of databases and software. Sage CRM is designed to grow along with your company.
11. **Company Stability -**
- a. **Ensure you Understand** – The stability and future of the company you are purchasing your system from is as important as the software itself.
 - i. Regardless of past success do you have sufficient financial backing to assure the software will evolve over the long term?
 - ii. How many versions (upgrades) can we expect annually?
 - iii. Do you charge for maintenance, support and upgrades of the software?
 - b. **Why it is important** – If the financial or support stability of the vendor is in question how confident can you be that going forward the software will continue to advance and be supported. What happens if there are financial issues or the software vendor goes away?
 - c. **How Sage CRM does it** – Sage Software is a Business Unit of Sage Group Plc, the largest business management software company for SME's in the world. Our commitment to Sage CRM is unquestionable, and no other product has more future growth potential or has had such success in a short period of time than CRM.

About Sage

The Sage Group plc (London: SGE.L), supports 4.4 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable applications through its portfolio of leading brands, including Abra®, ACCPAC®, ACT!®, BusinessVision®, CPASoftware®, FAS®, MAS 90®, MAS 200®, MAS 500®, MIP®, Peachtree®, Sage CRM®, SageCRM.com®, SalesLogix®, and Timberline® Office, among many others. For more information, please visit the Web site at www.sagecrmsolutions.com or call (866) 643-6400