

# 4 things you must remember before a CRM purchase

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Choosing the right CRM can be the difference between success and failure. This easy 4-step guide will help you choose the right solution and organisation for you.

### 1. It's all about the customer

Before you embark on a CRM adventure, you have to remember it's about your customers as much as it is about you. Think about how and what is needed to improve how they interact with you and your organisation.

### 2. Understand CRM, it is not just software

A CRM does not guarantee great customer service. CRM is much more than a software solution, it is an organisation wide philosophy, even with the technology; it is still about the people.

### 3. Need assessment

The four key aspects to CRM failure; being over budget, too little or too much functionality, behind schedule implementation, and user adoption could be avoided by holding a need assessment. Put time in your diary to hold a meeting with members from each area of your organisation and complete a need assessment. We know this can be difficult to do as users are in customer facing roles and need to concentrate on doing what you do best. Therefore, try and elect one person from each area that has the responsibility to collect the views of their selection of users. This little task will help you choose the best CRM provider for you and improve the success of the implementation of your CRM solution because you have determined the budget, the timescale, and the features the users want, which will improve their adoption.

#### 4. Promote organisation-wide adoption

One of the key elements to securing a CRM success is the user adoption. By already involving them in your needs assessment you have addressed their needs, and they feel part of the process. This will help create positive perceptions from the outset for your new solutions and incredibly boost the adoption rate. Offer them training before it is activated so they are as comfortable and confident as possible with the new solutions. This gives you valuable time to receive feedback from the users and give you time to make any changes to the system.

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