

## Checklist – Selecting A CRM Solution

The process of selecting a CRM system may be similar to the MDM selection process with a few variations. Specifically, the selection of any enterprise level solution typically includes the need to follow a step-by-step evaluation process.

The following process will also help organizations determine whether the CRM should be built internally or a third-party, cloud solution should be the choice.

Task	Description
<b>Establish a selection team</b>	This is perhaps the most important component of the process, as there may be multiple stakeholders who will use or be impacted by use of the CRM. It's usually best to include members of the following departments: Sales, Information Technology, Customer Management, Customer Support, Marketing and Communications, Finance and Credit Management.
<b>Determine what the organization wants to accomplish</b>	Whether it's interacting with the MDM, enabling greater insight into individual and group interaction with customers and prospects, identifying trends or analyzing potential revenue opportunities, an organization must identify those things it wants the CRM to handle.
<b>Identify all possible integrations</b>	Whether connecting with the organization's MDM, financial systems (ERP), HR management tools or any other solution the company uses, those integrations must be identified in order to select the best system. Not all CRM solutions integrate with all other systems easily.
<b>Determine what the solution should do</b>	While this step will likely be one of the most complex, it's completely necessary. To thoroughly determine desired capabilities, all stakeholders should have a say in identifying what they want as well as perceived shortcomings of potential solutions.
<b>Establish a timeline</b>	A complete but realistic timeline, from final selection, purchase, installation and full deployment, should be established to help set expectation and maintain accountability.
<b>Establishing a budget (initial and annual)</b>	Often, the budget will help dictate which solution is ultimately selected. What will it cost to initially install and deploy and what are the annual costs to maintain it – whether internally

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	built or subscribing to a SaaS solution.
<b>Creating a Scorecard</b>	When implementing a process for CRM selection, it's a good idea to establish a scorecard in which not only features, price and integrations are analyzed, but weighing the importance of each set of criteria should also be very helpful. For example, an organization must determine whether the integration with an MDM or ERP system is more important than automatic Geolocation capabilities. If it is more important, perhaps integration has a weight of 95 and Geolocation has a weight of 80. This helps ensure comparisons are done in a way that allows the most important criteria to take precedence over criteria that are simply nice to have.