



2020

Choosing a CRM Vendor – The Journey Continues



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8/11/2020

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BY [MAXIMIZER CRM](#)



In our previous article on [Choosing a CRM for your business](#), we provided a list of questions to help you identify your specific business requirements and individual CRM needs.

It is now time to move on to identifying potential CRM vendors and solution providers that match with those needs you've identified.

The CRM software market has become very crowded, and that is especially true in the past 2-3 years as new CRM start-ups race to grab a piece of what has been [estimated to be a \\$40 Billion industry](#) in 2019, with expected growth to \$80 Billion by 2025.

In the year 2018, the CRM market overtook database management systems to become the biggest software market globally. With such amazing growth prospects, the CRM industry is the fastest growing software market in the world, with no signs of slowing down.
– [TechPerspective](#)

Industry-specific vendors & partner networks

Some industries may have specific needs or requirements for peak efficiency, such as customized fields and workflows. If your business falls into one of these industries, you might want to look for a CRM vendor who has proven experience providing CRM solutions to companies similar to yours.

Most CRM vendors showcase a selection of their [customers](#) on their website, so this is one way to get an idea of the industries and size of companies they work with. If you don't see any examples from your industry don't hesitate to ask the vendor if they have any examples of clients that are similar to your company.

Review Sites and Partner Network

Another way to learn what types and sizes of companies use a particular CRM solution is to check the third-party review sites, such as [Capterra](#), [SoftwareAdvice](#), and [G2](#), for customer testimonials, references, review scores, etc.

Another factor to consider, particularly if you are looking for an [on-premise solution](#), is if the vendor has an established network of local or regional partners to provide localized support, training, and implementation.

Many large vendors, like Maximizer, have an established [Global Partner Network](#) who not only provide CRM implementation and support, but many also offer general business consulting services.

Available customization and training?

A CRM solution is only truly effective if it's configured properly and your staff is trained to efficiently and correctly use all of the relevant features.

When discussing price with each vendor, be sure to ask about the cost of properly configuring the software to adequately meet your initial needs, and if personalized training sessions are available in addition to online tutorials.

A CRM system should complement your business and align with your [sales process, marketing strategy](#), and your [customer service activities](#). It's important that the solution you choose is flexible and can be easily customized to match your needs and existing processes.

Adequate Training is typically the most important factor to ensure [successful CRM adoption](#). It should be an on-going, user-specific hands-on experience, so that everyone knows how to use the software efficiently.

Regardless of the delivery method, CRM training should not only demonstrate how the software works, but also how everything is connected, and how to get the most value and ROI from your CRM.

CRM Free Trials and Personal Demo's

The bottom line is that the only true way to evaluate a CRM is to see and try it for yourself. When you purchased your last vehicle did you test-drive it first or buy it sight-unseen? In all likelihood you test drove it and compared it to other makes and models.

The same approach is needed with a CRM given the amount and length of time it will likely be used, and it's importance within your company. Most CRM vendors today offer a [video overview](#), a [personalized demo](#), an [Unrestricted Free Trial](#), or like Maximizer, all of these options.

During a live demo session, an expert CRM Consultant walks you through the software and shows you how it works. They may be able to tailor their demo to your specific industry or application.

Regardless of whether you request and experience a personalized demo, we recommend you always take advantage of a [free trial version](#) in order to get a good feel of how everything works on your own time, and to help you compare strengths and weaknesses of each product being considered. It allows you to properly evaluate factors like ease of use, key functionalities and the ability to expand and customize.

Unless you are only needing a *very basic* CRM, we recommend discounting any vendor who does not allow you to test a full, working, unrestricted version of their software or platform before making a purchasing decision.

The User Experience

One of the most important criteria for choosing a CRM solution is how you feel and your experience when using it. Does it help you? Is it intuitive? Or, do you get frustrated or find it slows you down?

How many clicks does it take to carry out a common task? How effective and intuitive is the user interface? Is it easy to navigate? Are main functions clearly identified? Is the workflow logical?

All this constitutes what is called *the user experience, or UX*, and when it comes to a CRM system a positive UX is imperative because the success of the software rides on [user adoption](#). In fact, about 65 percent of CRM implementations fail due to low user adoption.

Some common CRM user experience complaints include:

- Slow loading time
- Inaccessibility of commonly used fields
- Not intuitively guiding users to the next intended action

When choosing the right CRM for your company it's important to ask *everyone* who will potentially use or benefit from the platform for their feedback. Talk to your sales team and customer service agents about how they input data, and how their current workflow can be improved with the right technology.

As you are watching a live demo, or testing out a [CRM Free Trial](#), ensure you are evaluating the system's user interface, your feelings while using it, and the overall ease of use.

In conclusion...

Hopefully you now have an understanding of **why** you need a CRM, **how** you will be using it, and **who** are the CRM vendors which offer a solution that fits your needs. While we hope Maximizer is one of the CRM's you are considering, we also understand that we are not a fit for every business. Regardless, we hope our two-part guide helps you in selecting the best CRM for your specific needs.

If you have any questions or would like to schedule a personal demo of Maximizer, or speak with a CRM Consultant, don't hesitate to contact Us:

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