

Avoiding the Top 10 Small Business CRM Mistakes

SMB Quick Reference Series

Making sure your CRM solution is a success...

Choosing and implementing Customer Relationship Management (CRM) solutions can be a resounding success or an unmitigated disaster. Big businesses can 'afford' the shock of failure. Small and medium businesses can't.

To achieve success in selecting and implementing CRM in your small and medium business, pay attention to overcoming the following:

1. You're Not Sure What You Need: Each CRM solution is different. To make sure you identify and choose the best solution for your business, prepare a brief summary of ideas, requirements, or objectives that you wish to be solved or delivered by the solution.
2. The Solution Can't Adapt to Your Business: Is there something unique about how you manage your customer relationships? If so, does a particular vendor allow you to 'customize' the solution to your unique needs? If the solution can't adapt, look elsewhere.
3. An "Uh Oh" Cost/Expense Moment: From up-front 'investments', to customization/consulting fees, to monthly or annual licensing costs, or subscriptions – each solution costs something. Make sure you uncover all the costs before you get started. Choose to work with solutions with simple fee structures and no hidden costs or additional expenses.
4. An Inexperienced Vendor: CRM is not 'accounting.' CRM is not "technology." Make sure that your solution vendor is deeply experienced in customer relationship management processes, best practices, solution implementation, and support.
5. Information Security: Your customer information is a key, strategic business asset. The information, communication, terms, services, and products you sell to your customers must be secure from intrusion, theft, virus/trojans, or other external threats. Make sure your CRM vendor is skilled at protecting you and your assets.
6. The Solution Doesn't Expand: Your business and customers can't be held back by an inadequate CRM system. Choose a solution that easily expands with your business and always provides fast, anytime/anywhere access – no matter how many customers you have.
7. The Solution is an Island: Your business is integrated to deliver the best customer experience possible. A CRM solution must fully integrate with your business processes, your environment, and your customers.
8. Little or No Connectivity: Your business uses common productivity and communication tools. Things like personal computers, software, email, fax, and mobile devices. You need the flexibility to have each of these devices act as communication tools and access points into your customer information to and from your CRM solution – even if you're out of the office.
9. Can't Get Fast Information: Make sure the solution you choose allows for 'real-time' reporting and analysis. Also ensure that you have access anytime, anywhere, from virtually any type of device.
10. Can't Get Help When You Need It Most: To maximize the benefit of a CRM solution, it must be used fully and across all relevant parts of the business. As such, training and support/help desk is mandatory. You need to have people and information ready to help, when you need help. Your business can't be left to 'figure it out.'

Want to avoid all of these mistakes with one decision? There is one solution that is built to avoid each of these 10 mistakes – SMB CRM, by NextCorp. As a subscription-based customer relationship management solution, designed specifically for small and medium business, SMB CRM brings you the right tools at the right time to plan, execute, and manage your customer relationships for advantage, new opportunity, revenue, and profit.

Go ahead. Learn more about SMB CRM. Call (800) 525-NEXT or visit: www.getsmb.com/smb/crm.aspx.

1-888-525-6398

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