

# Time to invest in a new CRM solution?

Don't let antiquated CRM systems hold you back!

A Caltech CRM Publication

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**Microsoft** Partner  
Silver Customer Relationship Management

## IS THIS BOOK RIGHT FOR ME?

Is this ebook right for you? CRM solutions can be confusing and we want everyone to get the most from our material. See below definitions to find out if your level matches the content you are about to read.

### Introductory

Introductory content is for anyone who is new to Customer Relationship Management (CRM) solutions. Also suitable for those wanting to know more about the principle of CRM solutions beyond basic contact management, and why CRM can be matched to processes and strategies.

### Intermediate

← *This EBook!*

Intermediate content is for those people who may be using CRM solutions and have an understanding of how they work. This content is also suitable for those who understand many to many relationships, and how powerful CRM strategies can be when they are working in alignment with organisational goals and processes.

### Advanced

Advanced content is for those who want to do more with CRM solutions beyond contact management. You will have a strong understanding of CRM solutions and how many to many relationships can propel compelling benefits, and enable processes to be more efficient. You will understand some technical elements of the solutions and integrating them across disparate systems.

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Time to invest in a new CRM solution?

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## Introduction

Is your CRM solution or database more of a hindrance than a use?

Are you working around the system more than in the system?

Do you use spreadsheets and are looking at a CRM solution to take your business forward?

How do you know if you even need a CRM solution at all?

Is it time you invested in a new CRM solution...



Customer Relationship Management (CRM) manages critical customer information so you can see it all in one place. As well as basic customer information, a good “many to many” relationship CRM solution, will let you see the customer at the heart of your business. Linked to them will be their products, their interests, your customer care to them, their orders they have placed with you, their queries and so much more.

A great CRM solution will support your customers and relationships externally and internally in your business, and allow effective communication and proactive account and case management.

When a CRM solution is perceived as “not working” it could be down to poor use by end users, inaccurate data or perhaps a distinct lack of process.

This ebook seeks to explain:

- 1) Where is your business now?
- 2) How do you know you have outgrown your current CRM solution?
- 3) Using your experience to move CRM forward.
- 4) SMB? Do we need CRM?
- 5) Find the right partner
- 6) Why Microsoft Dynamics CRM.

## Where is your Business Now?

When do you know if it is time to evolve your CRM solution?

If you are asking the following questions and you don't know the answers, it really is time to re-evaluate your processes and CRM needs.

- **Where is our data?**
- **Is our data in one place?**
- **Why are communications taking place outside of CRM?**
- **Why can't we use CRM for everything?**
- **Why is information held in so many different systems?**
- **Why is it taking more than a couple of seconds to find my customer data?**
- **Why do we think we are winning new business when it is an existing customer?**
- **Why are reports taking so long to generate?**
- **Do I have all information about my customers in one place?**
- **When was the last time this customer raised an order or a case?**
- **Why can we not find quotes that have been sent out?**
- **How are we to manage new processes now our business has changed?**
- **Why are my sales people in the office updating CRM data for the day?**
- **Who are my customers?**
- **Why are all leads not followed up?**
- **How do I know if leads have been followed up?**
- **This customer is different but how can my current system manage their requirements?**
- **How many sales are in the pipeline?**
- **Why are customers leaving us? What are our competitors doing?**
- **Why can't mobile staff see the information they need?**
- **My processes are far more complex than my CRM can manage...**

## How do you know you have outgrown your current CRM solution?

Don't forget, when CRM isn't working it could be down to the following reasons:

### End Userability

The end users hate it... they don't understand it. Perhaps they just need training on the system? They see it as a waste of time...

Find out what your end users **really** think. Get together users that do and do not use CRM and find out what they love and loathe about it.

What are the fundamental problems?

What do the users love?

### Data



Is your data clean?

As CRM consultants we ask that question a lot and we usually get a "yes, of course."

That's great if that is the case.

Often we see systems with no data entered, or data with no owners. Data that is out of date or inconsistent.

Drill down on your data.

Is it consistent?

Do you know who your customers are?

Who owns the data?

Where was the data from?

Does the data work? Are email addresses bouncing?

## Processes

Does your CRM follow a process?

Does your CRM system guide your end users through several key processes?

Does CRM drive your processes and one size does not fit all?

If you are trying to get around your CRM rather than using CRM as a pivotal guide then it simply isn't working. Guided user processes ensure consistency and user adoption.

The first step we would recommend would be to map your processes.

Find out what the teams are doing and where the current CRM succeeds or fails.

Will your old system support your new processes?

When you have gathered this information you will know if you can save your CRM solution and develop it, or if it simply isn't going to be fit for purpose. Perhaps it would be less expensive to rip and replace it? If you have outgrown your CRM it is a great opportunity to move forward and release those chains!

## Using your experience to move CRM forward

First time around, mistakes will have been made with your CRM needs or implementation. You may not have known exactly what you needed. Early CRM systems didn't consider processes or sometimes working with processes.

Your first CRM implementation may have been many years ago – and let's face it, technology has moved on considerably in the last few years alone.

Perhaps you implemented a bespoke CRM solution and the person or company that built and supported it are no longer trading.

Looking at the past can be a great opportunity to be clear about the future. You know where your incumbent CRM had its limits and you will know what failed or what hasn't delivered.

Use the data you have already in your incumbent solution to work out what else you need. What works that you don't want to lose. Are there any features your users are fond of that you may wish to retain?

Or perhaps it has limitations and you have a requirements list of things you want to achieve this time around. Don't be tempted just yet to look at systems – think about your requirements and what you want to achieve.

What would your users love to see in the next revision of CRM?

Think about reporting. What do you need to drill down on? What do your monthly or Board reports include?



Use your first implementation experience to move forward by understanding the limitations of the first system and any mistakes you made. Perhaps you saw improvements that you want to build on?

Few organisations involve the end users to choose and input to their CRM solution. Companies wanting to realise gains from CRM must get their staff involved early on. Employees must be contributing to the processes and desire to generate efficiencies. If they are involved in choosing the system as well, even better! They need to help champion it and move their teams forward. Change can bring resistance so it really is about demonstrating the human approach. CRM although a software, is really about hearts and minds.

It may be hard to move on from a first CRM solution following your investment of time, money and energy. Perhaps it was your project, and it has served the business well. It may have been revolutionary at the time, but if it isn't able to move forwards you need to review it. Do look at the limitations of existing systems and if they are harming your business and wasting time, then don't hold your business back.

## Do we need CRM?

Customer Relationship Management describes a strategy which places the customer at the heart of an organisation's processes and activities. The fundamental philosophy is that by managing your relationship with a good customer, you can increase your profitability.



By building customer profiles an organisation can assess the true value of clients and understand how they can support clients better giving a great customer experience, retaining that customer and truly generating a great customer relationship.

As businesses grow they will outgrow spreadsheets and Outlook contacts and even simple Access databases to manage their processes and organisational data. Using CRM can be a major opportunity for small, medium and large businesses to get ahead, and be more agile.

If you answered yes to some of the questions on page 6, “Where is your Business now?” then you really do need to look at CRM and how it can help you and your business.

CRM will help businesses of all sizes to make better business decisions and will empower your growing business.

Check out case studies and see how other businesses have generated a competitive edge by using CRM solutions.

## Why Microsoft Dynamics CRM and Finding the Right Partner

Microsoft Dynamics CRM (Dynamics CRM) is scalable for businesses of every size and complexity. One of the best things about working with Dynamics CRM is that it can be tailored for small businesses without compromising on great features.

One of the huge benefits of working with Dynamics CRM is the partner community. Caltech IT Limited (Caltech CRM) has accreditations in Dynamics CRM specifically. These qualifications are updated annual and we have to demonstrate to Microsoft that we are delivering great CRM solutions for our customers.

Having a sole focus on Dynamics CRM as a business means that you really are working with experts.

There is an extensive support community for Dynamics CRM.

Microsoft was named the winner, 2015 CRM Market Leaders in the categories :

- Enterprise CRM suite
- Midmarket CRM suite
- Small Business CRM suite
- And Sales Force Automation

The Market Leaders research concluded that “organisations today want CRM technology that provides easy access to essential data (through the cloud, mobile devices, and a unified user interface); the ability to personalise customer experience; and predictive and prescriptive analytics that can scour oceans of data...” [Read more](#)

As businesses continue to evaluate their CRM systems, they are often moving to Microsoft Dynamics CRM. Forrester Research reviewed Microsoft Dynamics CRM Online and suggested that “Microsoft Dynamics CRM 2011 gives a 243% return on investment.” [Read More](#)

Nucleus also stated “Microsoft CRM 2011 is “easier to use” than salesforce and half the cost!” [Read More](#)

In April 2015, Gartner found that Microsoft Dynamics CRM for Customer Service was the second-most-asked-for CRM product... as well as stating that “(the vendor) has the benefit of solid financial standing and commitment to the CRM product line, global data centers, sales, marketing and customer service, as well as access to a deep bench of developer resources and global deployment partners.” [Read More](#)

These results are not surprising to us as we have been working with Dynamics CRM now since v. 1, and CRM solutions since 1999.

The top reasons why your CRM should be Dynamics CRM are:

1. Turns Microsoft Outlook (365) into a place to manage all customer communications
2. It works the way you want your business to work
3. It works with Excel and Word
4. It will give the right information, to the right people at the right time
5. It will improve your data to ensure that you give the right message to the right person
6. It makes service scheduling easy
7. It integrates with existing systems
8. It will improve and focus on your processes

So why not review Microsoft Dynamics CRM as a second generation CRM solution for your business? Unlock those shackles and release the power of your teams and organisation.

Working with CRM consultants like Caltech will help to get you moving quickly with Dynamics CRM regardless of your size or process complexity. We can ensure that Dynamics CRM extends your systems and will be customized to your use.

When choosing a partner ensure that they take time to understand your business, your processes and your goals. Make sure they understand what you are trying to achieve and ensure they will deliver a precise tailored solution.

Check their process for implementation and look at reference sites or case studies. Remember, don't lose faith in CRM. By focusing on the right goals you can achieve huge benefits.

## More Reading

Why not download our white paper, "How to get buy-in when building a CRM business case."

## Next Steps

Contact us for a free assessment and discovery meeting.

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