

# 3 COMMON MISTAKES

businesses make when  
choosing a Sales CRM



**Michael FitzGerald**

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# Introduction

## **Building your business can feel a lot like a bike race.**

What if you wanted to become a world-class cyclist and compete in a race like the Tour de France? How would you prepare? You certainly wouldn't just show up on the day and expect to take home the gold. High performance athletes will tell you – success is not only about enthusiasm and talent, it takes a lot of hard work to win, strict training schedules, discipline and focus.

Building your business can feel a lot like a bike race. Success in business is competitive, and requires considerable effort. As in a race, you have an audience: a network of investors and supporters; competitors; and many challenges on the road ahead. It takes focus and dedication, and you want to win.

Measuring and tracking your progress on a daily basis is an important part of achieving your goal.

In a bike race, you know your competition, you check your time against theirs and decide what you need to do to improve your position. It's the same with your business – you have to know your competition to be able to grow your market share, and you have to measure what's working and what isn't on a daily basis to make the necessary changes and improve sales.

However, in this era of high technology, if you want to give yourself the best possible chance of winning, there's more than just the mental and physical training to consider. You need the right equipment also. When choosing your bike, in particular, you will take many things into account to make sure it's the best one possible: weight, aerodynamics, strength and comfort. You want to know that it will maximize your performance and be entirely reliable.

Same applies in business. You want to be as efficient and dynamic as possible because you want any advantage you can get on your competitors. And so choosing and using the right technology is crucial.

One of the most common tools companies use to grow their business is a CRM system. CRM systems should help sales reps to meet their sales goals, and help managers to track progress and make important more informed decisions about strategy. But sometimes instead of helping, the wrong CRM system (like the wrong bike) will cause you to lose the race.

## **The three biggest mistakes businesses make when choosing a CRM are as follows...**

Did you know?

Increasing customer retention by just 5% can increase profits by 25% to 95%.

- Bain & Company



# Mistake #1

## Choosing a complicated CRM system becomes more of a burden than a help.

When you are training for the big race, you might think that a bike with a lot of features and “extras” would be the best bike for you. After all, the more bells and whistles it provides, the more it can help you win – right?

Wrong. Often too many features can be confusing and distracting. Some don't contribute at all to performance. If you're too busy trying to figure out how to capitalize on all the features, you risk lagging behind the competition.

The same principle applies to CRM systems utilized by SMBs. If you're using a system that is too complicated, then it will actually be counter-productive to your sales.

Many SMBs aren't looking at current needs when choosing a CRM system, but rather at what other companies are doing. It's easy to be impressed by enterprise class CRM systems – all the connections, settings, and reports they provide are great, but they can distract you from focusing on what's most important, which should be Customer Relation Management that supports your sales staff.

## 4 Common Myths of complicated CRM system:

1. If enterprise companies use this system it will work for me as well.
2. If I use the same system as larger companies I'll be better-positioned than my competitors.
3. I may not need all of the features now, but I expect to grow and then I will need them.
4. My SMB is good enough to use the same system as corporations use.

It's important to be realistic in selecting your CRM system. It might be exciting to buy a top-of-the-range bike used by the pros, but will you be able to manage the ultra-thin wheels and race pedals? Perhaps a simpler bike to start with would be better, designed for speed and ease of use. The practical use of your CRM system on a day-to-day basis is extremely important – how long it takes to enter and access your data, how big you will grow your sales team, and how much time you can devote to training should all factor in to your decision. (The cost of your CRM system should be a part of your regular budget, so you might want to include it in customer acquisition and retention costs.)

Did you know?

There's a big need for consumer education when it comes to CRM for small businesses, and it's not happening. So CRM systems are being sold to small businesses who don't understand what they are buying.

- New York Times



If you're tempted to choose a CRM system based on how many different types of reports it can generate, rather than how easy it is for your sales staff to use, you need to remember that a CRM system isn't just a management tool. It's very important for sales staff to be able to and to want to use it, too. They should be communicating with customers and selling, not struggling to understand how the CRM system works. Nor should you risk adding a whole lot of coaching and training to their workload, or worse still an entirely new administrative layer to manage the CRM.

And what about cost? Enterprise class systems are highly customizable, but this also means a much bigger price tag. Additional modules embedded into larger CRM systems (for features like mailing or accounting) are fine for large corporations with plenty of staff to handle them, but do you have money to spend on a development team to customize yours? What if your custom module stops working, do you have staff to monitor and fix it? It's better to add customization modules only when you need them, and to use standard apps that specialize in each area (mailing, accounting, etc.) which are less expensive and have more functionality. This approach makes more sense for SMBs.

You should benefit from using a CRM system without it shrinking your profits.

Look at it this way: It may be tempting to purchase a bike with many fancy features, but if these extras create a steep learning curve, require expensive care and aren't contributing to your ability to compete effectively and win the race, then it's a waste to spend money on them.

# Mistake #2

## Choosing a simple CRM system won't support your needs.

So, you have wisely decided to steer clear of the top-of-the-line luxury bike and are going with something far more practical. After doing a little research, you've chosen a no-frills bike that provides basic features like brakes and gears but nothing else. You've been training for the big race the last few weeks on the new bike, and have noticed that your muscles are cramping, you're more tired at the end of each session, and your speed is not improving. In fact, your bike is not supporting your efforts, it's too basic and doesn't have the features you need to be competitive.

Likewise, your CRM system should have enough features to support your sales efforts, and not be so simple that it just doesn't contribute to business growth.

### Pitfalls of downgrading:

#### Switching from an advanced to a too-simple CRM system

People often over-react to previous experiences without thinking calmly through what they really need. Focusing only on low cost, basic systems just because they are cheaper isn't necessarily the wise move.

#### Some suppliers oversell their CRM systems

Companies that provide small, basic CRM systems often make promises they can't deliver given their limited functionality and features. Sometimes calling their systems "CRM" is misleading because they provide little more than an address book. Keeping all your contacts in order is just a small part of the whole CRM system. What about tracking your sales history, viewing your pipeline or forecasting sales? What about supporting your sales team with actions management, or segmenting your data for analytics and better targeted marketing? None of that exists in simpler systems, even though you might assume it does because it's called a "CRM" system. It's important to study the details before you invest your money.

#### SMBs might underestimate what a CRM system can do

Some SMBs choose a simple CRM system based on the features they know it can provide, like an address book and a calendar to stay organized. They aren't looking for built-in sales support or methodology that will help sales people. But a good CRM system can, in fact, help drive sales, and should be a key part of your sales function. Otherwise, it's a missed opportunity.







### Important

Instead of going with the simplest CRM system, think about what you need. Are you looking to increase sales? Do you want your ad campaigns to be more effective with proper follow-through? Do you want your sales reps to be able to continually update each other about customers?

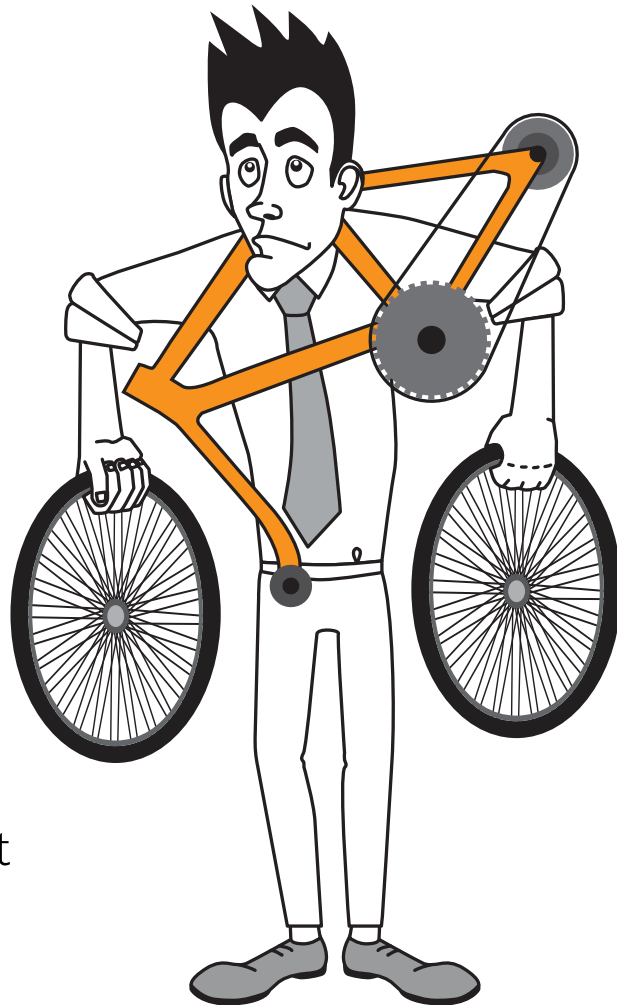
# Mistake #3

## Choosing CRM that doesn't integrate with other company's operations.

Imagine the big race is just a few weeks away. You said goodbye to the top-of-the-line bike and then upgraded from the too-simple one that was doing you no favors. You added the custom parts required for competitive cycling to your bike - like integrated brakes, light-weight pedals, contoured handlebars - but you're having problems again. It keeps breaking down, interrupting your training schedule with all the fixes it needs. Maybe it wasn't put together well to begin with, or maybe once all the parts were installed you discovered they don't work well together. Either way, you're wasting valuable time, because you have to constantly fix the bike - and it's not getting better or easier to ride. This could cost you the race, because your competitors are busy training without interruptions.

CRM systems that don't offer the ability to connect to other parts of your business (like lead generation, lead nurturing, accounting or communications) are not serving your company in a way that maximizes revenue. Your Sales Ecosystem is incredibly important, because it's at the heart of how you do business. It's also easy to overlook, because you might not be thinking about the integration of your CRM system with marketing or accounting applications when you're focused on addressing a specific need.

But looking at the CRM system as a whole and how it integrates with your business practices in the long-term is what helps businesses grow.



Avoid On-premise dinosaurs...

The on-premises approach to deploying and using business software was the most common until around 2005, when software running at a remote location became widely available and adopted.

The new [SaaS], alternative deployment and use model typically uses the Internet to remove the need for the user to install any software on premises and had other accompanying benefits: running software remotely can result in considerable cost savings because of reduced staffing, maintenance, power consumption, and other factors.

- Wikipedia

Good CRM systems are in the center of the Sales Ecosystem. Businesses require different tools / applications for different activities, but they need to communicate with each other in order for you to efficiently run your business. A good CRM system accounts for your business as a whole, so if you need to add another module along the way to link to marketing campaigns or billing, it can fit in smoothly with your existing set-up. There's no need to revamp the system every time you add new functionality.

For example, let's say you have a big marketing campaign and you've paid for Adwords to drive web traffic to specific landing pages on your website. You've created several landing pages for different target audiences, and people are submitting their data when they are interested in your products or services. Time is of the essence. It's crucial to reach out to potential customers as quickly as possible, because you can only hold their attention for so long before something else attracts them. There are several services that help you to create amazing landing pages or webforms without any coding, so you don't have to spend additional money by hiring a developer for each campaign. Ideally, you want the landing pages to talk to your CRM system and submit data in real time, so you can assign actions to your sales reps. You might also want to automatically send potential customers a newsletter with a welcome offer. Once you create your lead generation process you'll be able to evaluate which landing page brings you the best customers. Then you can make changes to your campaign before it's over and increase profits by sending all remaining traffic to the landing page that results in the most sales.

The best CRM systems offer this kind of integration with outside modules and applications to help connect the different parts of your business seamlessly, so that you can concentrate on growing sales.

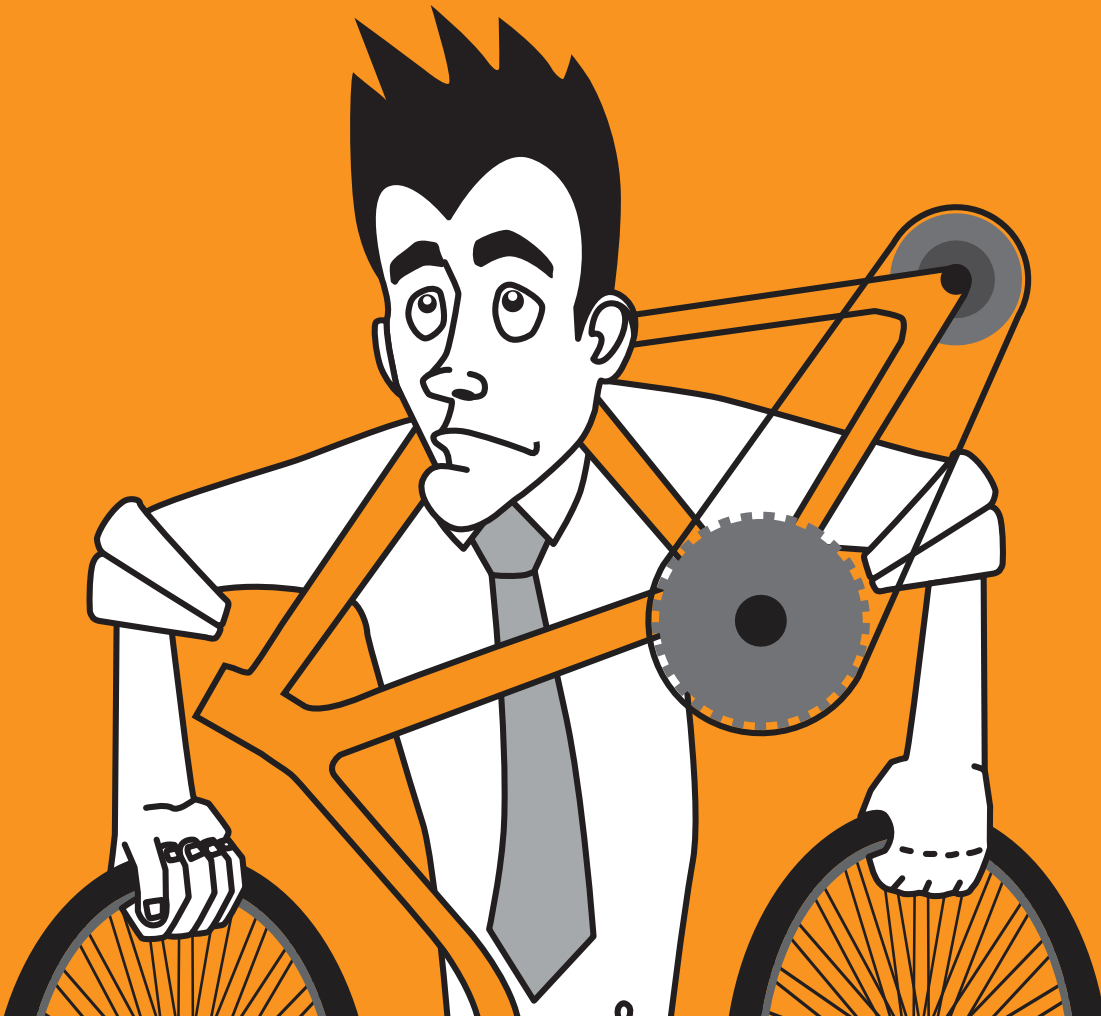
There are systems that don't work this way, some of them not even in the cloud, and they are considered dinosaurs in the CRM world. When you choose a system because it's "the safe choice" and has been around for so many years, it might actually be a hindrance to your business growth. This is because older CRM systems tend to be built using updates to the same traditional technology. They aren't as flexible as newer systems. Companies selling older systems might claim they create a true Sales Ecosystem, but with older technology everything is more complicated and expensive to integrate and utilize, if it's even possible to fully integrate these systems.

And what about the bike race? Trying to fix your current bike isn't going to be easy if the parts aren't fitting together well. It might be time to consider other options. It's a matter of finding out which one is right for you.

Choose wisely!

“47% of CRM projects fail to fully meet expectations”

- Forrester Research, 2009, as part of a study on how companies can better utilize CRM tools.



# Are you ready to win?!

You've learned that a good physical training schedule, mental focus, and the right equipment are what you need to win the bike race. It's the same with your business. Choose a CRM system that will support your company instead of being an administrative and time-wasting burden.

A good CRM system should not be a "dead database" - it should help sales people be proactive. They should have all the current information they need about customers and targeted sales leads, and it should all be gathered in one place.

The best system will help you focus on next actions. Sales is a sequential process, one step at a time. When you're trying to close a deal, you move from one action to the next until you achieve your goal.

CRM should be at the heart of your Sales Ecosystem. A good (appropriate for your business!) system makes everything easier not only for sales but for all aspects of the company.

It's your time now - race is on!



# AVOID MISTAKES WHEN CHOOSING A CRM SYSTEM FOR YOUR BUSINESS

If you still have doubts and you are not sure how to choose the best CRM system, let us know at [support@onpagecrm.com](mailto:support@onpagecrm.com).

You can also test our Sales CRM system to check if OnePageCRM fits your company!

## The Anatomy of your Action Stream

A dynamic list of contacts with their next action, sorted by date

### Next Action workflow

Based on a simple dashboard, prospects float to the top when action is required.

[Learn More...](#)



### How it's sorted

Contacts are sorted by priority and date.

ASAP & Overdue actions are displayed on the top of your Action Stream highlighted in red, followed by Today's in orange and then Upcoming actions in grey.



CONTACTS	NEXT ACTION	DATE	STATUS
Jane Power HomeWare Hevin	Follow up with intr	ASAP	ASAP & OVERDUE
Paul Byrne Patterson Media	Follow up with Pau	DEC 8	ASAP & OVERDUE
Joe Bloggs Big Company LLC	Call Joe re pricing	TODAY	TODAY
Texas Instruments Tony Kinsley	Call Tony to make	TODAY	TODAY
Archimedes Tools Inc. Jane Doe	Email Jane with se	TODAY	TODAY
Solar Fitting Ltd Ed Billings	Do tech demo for J	DEC 10	UPCOMING & WAITING FOR
Victoria Grant Little Steps Ltd.	13:35 Forward the	DEC 10	UPCOMING & WAITING FOR
Tony Monero Home Suppliers Ltd	Call Tony to keep	WAITING	UPCOMING & WAITING FOR
Acme Inc Jane Doe	Has Jane respon	WAITING	UPCOMING & WAITING FOR
Sunnydale Systems Edmund Roe	Call Edmund to s	WAITING	UPCOMING & WAITING FOR

### Sync to calendar

Connect your Action Stream to your preferred calendar to view your daily tasks. [Learn More...](#)



### Notifications

Morning email  
Kick start your day with a summary of your sales actions sent to you via email every morning.

### Time in Next Action

Set a specific time for a Next Action and get a notification at that time. [Learn More...](#)

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# Author

Michael FitzGerald is CEO and founder of OnePageCRM. A Design Engineer by trade and inventor by nature, his career has taken him from designing Olympic athlete test equipment to the development of consumer products for multinational companies. Michael's strength is in creating concepts to give the ultimate user experience. Michael has grown OnePageCRM to over 10,000 customers across the world.

