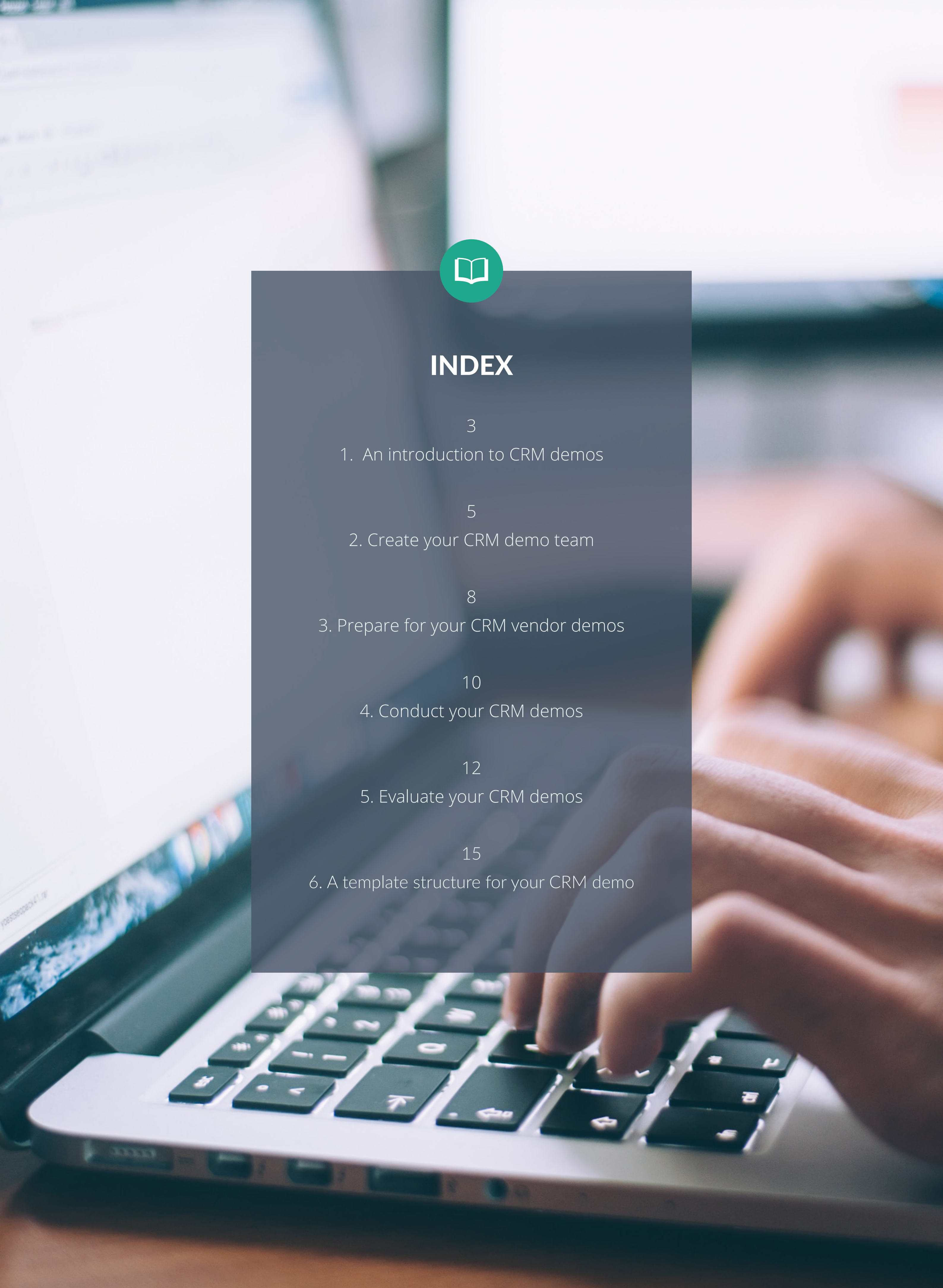
# MASTERING CRM DEMOS
# IN 5 EASY STEPS

Your comprehensive guide to planning and evaluating CRM vendor demos

## GUIDE HIGHLIGHTS

- Creating a demo team and preparing for presentations
- Evaluating demos and making a final selection decision
- A template structure to follow for your CRM demos



# INDEX

# 1. AN INTRODUCTION TO CRM DEMOS

You've compiled a shortlist of what CRM systems you think are most appropriate to your business, and you're ready to start scheduling some demonstrations. Exciting times!

Before you start contacting the companies on your list, however, here's an overview of what to expect and the potential pitfalls to avoid.

## WHAT IS A CRM DEMO?

It's a chance for you to see for yourself the CRM system in action, maybe uploading some of your own data to make it more realistic, so you can get a feel for the system capabilities, explore any possible areas where the system can't do what you require of it, and see if it's a good fit for your requirements.

## HOW DO CRM DEMOS TAKE PLACE?

There are two types of demo: online and traditional face-to-face. The most common, particularly for lower-end CRM systems, is online: a salesperson will call you or invite you to an online meeting at a pre-agreed time, and walk you through the system and their presentation via a series of slides displayed on your screen. There will usually be some form of screen sharing or you may be given a trial login to their system so that they can show you how it works.

More traditional demonstrations, meanwhile, take place at your premises with the supplier's representative agreeing a time to call in and present the system to you and whoever else in the business is involved in the process of selecting a CRM system.

Online demos are obviously less time-consuming and easier to arrange than the more old-fashioned method. On the other hand, with a representative in your building, it is easier for you to get a feel for the company behind the system, and to enable multiple persons to ask questions of the potential supplier. For this reason, conduct face-to-face demos whenever possible, although if you're not sure an online demo can be a good place to start – and you can move onto a face-to-face demo if they make it through the 'first round'.

Any CRM supplier worth considering should be happy to arrange a face-to-face demo at a time and place that suits you. If they can't, consider choosing another vendor – remember, selecting a CRM system is like choosing a partner for your business – so you'd better make a good choice!

*"Any CRM supplier worth considering should be happy to arrange a face-to-face demo at a time and place that suits you"*

As the old saying goes – **marry in haste, repent at leisure...**

## WHAT TO EXPECT DURING A CRM DEMO

Firstly, the vendor will usually ask a series of questions about your organization to help them establish how you will be using their system.

*"Remember, the salesperson is likely to be on commission, and will often try to move you towards a decision as quickly as possible"*

They may also at this point give you a bit of background on the company – date of founding, number of employees, number (and size/type) of companies using their system, and so on. If they skip over this part, it's worth interrupting them and asking for the information – you need to have complete confidence not just in the system but in the company behind the system, so make sure you cover this before you get too deep into the demo.

They will then introduce you to their CRM system and go through the main features and benefits, either while you input data and experiment with it so you can see how it would work in the real world, or while they play video clips or animations that demonstrate what they are saying. It is of course much better if you (or a member of your team) can experiment with it during the demonstration – you will get a much better feel for it this way, in particular how intuitive the main functions, prompts, menus, and data entry fields are.

The demonstration will usually conclude with a further Q&A session and a sales pitch. Remember, the salesperson is likely to be on commission, and will often try to move you towards a decision as quickly as possible by offering limited-time discounts, special deals if ordered before the month end, and so on.

**You should resist this firmly,** for reasons we have already discussed. If this makes you uncomfortable, it's best to tell the salesperson right at the outset of the demo – something along the lines of "We won't be making a decision on this immediately – this is purely a fact-finding mission for us at the moment" – to avoid any misunderstanding later.

## 2. CREATE YOUR CRM DEMO TEAM

You have created your vendor shortlist, your CRM demos are all booked up and you're looking forward to finding out what the companies on your shortlist can offer you. Now, the process of deciding who should be involved in these demos begins!

In days gone by, CRM was viewed as a tool mainly for the sales and marketing teams – offering an enticing way to identify opportunities and maximize the sales potential from every contact. However, the clue is in the name – Customer Relationship Management – CRM now touches almost every department of the business so we need to think in much broader terms.

It's important to ensure that the CRM system you choose will do what every department requires of it. You'll be sowing seeds of potential conflict if the system works like a dream for customer services but frustrates the sales reps at every turn, for example! With this in mind, let's dive into the different silos of a traditional business structure to help you identify who should be involved in your CRM demo team.

### MARKETING

Usually a key driver of CRM implementation, your marketing department will be interested in:

- How the system handles potential customers as well as existing ones
- What (if any) email marketing and social media integrations the system offers
- Reports that show prospect engagement.

If you have a dedicated marketing manager or team then they should certainly be invited to attend your CRM demos.

Set up an approach to respond to these complaints. Focus on the benefits of CRM for them - for example, streamlining administrative tasks allows more time to close sales. Address the concerns of these individuals one-on-one, enlisting the help of peers and supervisors.

## SALES

Salespeople are naturally heavy CRM users, so it would be usual for the head of sales or a nominated sales team member to be present at the demo. Like their marketing counterparts, they will want to see how the system identifies opportunities and assists salespeople to close them, but they may also be interested in how the system can help them to care for their existing customer base.

## CUSTOMER SERVICES

Where a really good CRM system is perhaps most impressive is in enabling the customer service team to look after every inquiry with the minimum amount of wasted time and with maximum speed and efficiency.

No customer likes having to repeat the same issue to several different employees of the same company. CRM can avoid that and help teams work together to overcome problems and ensure that each customer gets the individual attention they deserve.

*"Remember, if your CRM doesn't work for customer services, it will be far less useful for the other departments"*

It is now possible for CRM systems to automatically add 'events' to a customer timeline with little to no effort on the part of customer service team members by email monitoring (for example, CRM identifies the customer by domain name and tags a copy of the correspondence to that customer's file) or by adding recordings of telephone conversations to a customer file. Features like these are all-important to often very busy customer service operatives and it's essential a representative from this team is present at your CRM demos to evaluate the options available.

**Remember, if your CRM doesn't work for customer services, it will be far less useful for the other departments** – so this is one to insist on.

## FINANCE

A CRM system can be really useful to finance, whether for tracking invoice queries, alerting other teams to credit limit issues, or just being able to view a complete picture of each client so they can efficiently manage credit note requests without having to refer back to other departments first.

Finance will also be interested in ensuring that the CRM system you choose does not exceed the budget allocated, so it would be wise to offer them the opportunity to be present at your CRM demos!

## OPERATIONS

Typically including IT, purchasing, logistics, admin, and warehouse responsibilities, you will want at least the IT manager to be present at CRM demos – it will be his or her job to ensure whatever system is chosen is compatible with your IT infrastructure.

Some CRM systems have delivery vehicle or consignment tracking integrations to help deal with the "where are my goods?" type inquiries. This will help the ops manager as he or she will have far fewer calls from customer services if these questions can be answered with a few clicks!

## SENIOR MANAGEMENT

This will depend on your company structure – as this is just a demonstration, often senior managers would rather read a report containing your recommendations than attend all the software demonstrations of vendors on your shortlist.

Whilst it is ideal that your C-level sponsor attends demos with you, they are often very busy people and getting them to commit to blocking off an afternoon or two to attend your demos. When you have narrowed down the field to just two potential systems, it might be a good time to include se

## BRINGING IT ALL TOGETHER

While including members from all the different parts of the business may seem excessive at this stage, remember that no matter how amazing the CRM system, without it being adopted by all departments in the business, you won't be able to reap the benefits.

By including people at this early stage you will win their crucial 'buy-in' and support through the inevitable disruption that will follow from implementation – they will each have had a stake in the decision and will feel a shared ownership of the project.

*"No matter how amazing the CRM system, without it being adopted by all departments in the business, you won't be able to reap the benefits"*

If you are worried about potential disagreements, then consider clarifying at the beginning that it is your intention to involve everyone in the decision-making progress but that certain compromises will have to be made – what works amazingly for one department might be just the wrong solution for another. The final decision should be respected and supported by all departments with a view to getting the best overall solution for the company.

# 3. PREPARE FOR CRM VENDOR DEMOS

Now you have the first CRM demo booked, it's time to plan for it so that you can extract maximum value from the time invested. Overall, you need to make it clear from the outset that you are in control of the process, so that a minimum of time is spent on issues that have no relevance for your organization.

## MAKE SURE YOUR TEAM IS WELL PREPARED

At least a couple of days before the demonstration is due to take place, you should gather your demo team and ask each member to state their top two or three-three objectives for your new CRM. Explain that you will be chairing the meeting/CRM demonstration (or assign someone else to be the chair) but that all members should be free to interject or ask questions at any point.

*"For a 10 user team wanting full implementation and training services from their consultant, costs can run up to $10,500"*

Remind your team how important it is that the CRM software works for every department in the business. Go over your key requirements and ensure everyone is clear what features and benefits the company as a whole require from this new CRM system. You may wish to consider listing these features and benefits out as a team and assigning importance levels to each, dividing your list into two categories; 'essential to have' items and 'nice to have' items.

## KEEP THE VENDOR IN THE LOOP

It is important that the vendor is aware before the demonstration begins of your program for this event and those you expect to be present. The best way to do this is by sending an agenda by email at least 24 hours before the demonstration is scheduled to take place.

On the agenda, you should list all meeting attendees (and their respective department titles) and time allocated for each agenda item. In order to fully explore the requirements of your organization and the ability of the CRM vendor, you will need to allow at least three hours, although even this might not always be enough.

Now, you have set the stage for a successful and productive CRM demo. Your team is aware of the company priorities and their specific department priorities and requirements in relation to the proposed CRM system and the vendor is aware that the demonstration has been carefully planned with timescales to operate within.

## CONSIDER CREATING A DEMO SCRIPT

One way to ensure that you get to see the aspects of a system you want to (as opposed to listening to a sales pitch for an hour or two) is to send your shortlisted vendors a script to follow in advance of the demo.

This should specify a structure for the demo, with time allocated for each of your top requirements and - if you like - a couple of real-world scenarios for the vendor to demonstrate on their software. As well as ensuring all of your key requirements receive the attention you want them to, making each of your vendors conform to the same script provides your team with uniformly structured demos to evaluate against each other.

If you do decide to do this, there are a couple of things to bear in mind:

- **Send scripts out in plenty of time before the arranged demo.** You want to give your vendors the opportunity to show their system in the best possible light - sitting through rushed, last-minute presentations is a waste of time for your team as well as the vendor's sales rep
- **Allocate time in the script for the vendor to showcase their favorite features.** You want your interests covered, but you should always remain open-minded about what would be useful in a CRM system.

# 4. CONDUCT YOUR CRM DEMOS

When the vendor arrives at for your demo and introductions have been completed, it is time to start working through your agenda.

We recommend beginning with a brief company overview, giving some history and background to your organization and systems used to this point. Summarize your overall company goals relating to CRM and remember to state that this demonstration is the first stage of the procurement process and that no decisions will be made today. This will save you a lot of time later in the demonstration and keep the focus firmly on the system, the required investment, and subjects important to you rather than requiring all of your team to listen to an extended sales presentation designed to rush decision-making, as many of these demonstrations tend to do.

The next item on your CRM demo agenda should be to request from the vendor a brief overview of the company behind the proposed system – for example, when they were founded, what industries they initially focused on, how their company grew and expanded, and the kind of industries they focus on today.

*"The vendor will be keen to show all the features of their system, so be prepared to intervene if necessary"*

## THE CRM DEMO ITSELF

Now, it is finally time for the CRM demonstration of the system itself to take place. The vendor representative will most likely follow a script for this, taking you through different sections of the system, allowing you and members of your team to input data and experiment with the CRM interface. The vendor will be keen to show all the features of their system, so be prepared to intervene if necessary, if you feel a certain feature is not relevant to your organization.

As you go through the CRM demo, it is important that you include relevant team members in each section so that no one is left out. Encourage each team member to explain their departmental requirements in relation to CRM and to ask questions and request demonstrations of how the CRM system being tested can meet these. When the demonstration concludes, review your company goals once more in the light of what you now know the system can offer you.

## AFTER THE CRM VENDOR REPRESENTATIVE LEAVES

Ask once more for feedback and further questions from your team, thank the representative for his or her time and allow him or her to leave. It is important now that you do not allow your team to leave until you have been able to conduct a debriefing in the absence of the vendor representative.

This is a critical stage of the CRM selection process, as it allows the team to freely discuss both the good points and bad points or any perceived weaknesses in the system you have just witnessed being demonstrated, without fear of offense, and while it is still fresh in your mind. Ensure that these points are noted for distribution to your team later in the day.

You now have a complete process that you can use for all subsequent demonstrations that will help you to rule out certain CRM options and come up with a shortlist of potential options for final consideration.

# 5. EVALUATE YOUR VENDOR DEMONSTRATIONS

After the demonstrations have been conducted, you will most likely need to go back to the vendors with questions about functionality and how the system will work for you. You then need to rank each vendor, putting together a final vendor selection list of just one or two.

## SCORE EACH ONE

When it comes to evaluating the CRM vendor demonstrations, how do you judge and score each one? Is there an easy way to rank each demo in order that you can isolate the best CRM system for you?

To avoid choosing a CRM that will fail due to poor usability, you have to take the time to ensure that the solutions offered will integrate fully with your existing systems. Don't just rank the demos according to their function; concentrate on how well they will refine your business processes.

## MAKE YOUR DECISION BASED ON INFORMATION PROVIDED

The CRM demonstrations should have provided you with plenty of information upon which to base your decision. You could make a list of key software features that are 'must-haves' and then score each one accordingly. A simple system is to rate them on a scale of 1 to 5 with 5 being perfect and 1 being not suitable at all. Here are just a few ideas but you can add your own:

- Will the CRM get rid of bottlenecks when it comes to workflow?
- How will it improve the processing of various transactions i.e. raising a new sales confirmation order, invoices etc?
- Will reporting capabilities be improved?
- How flexible is the software – can it be attuned to suit your business needs
- How will the new CRM bolt onto your existing systems?

If the vendor is one that you have used before, think about your current relationship. Do you fit well together and can you imagine working with them for the next few years? For the CRM to work well, the whole team needs to work in harmony.

## USE POCS WHERE NECESSARY

Once you have whittled the list down to just a couple of suppliers, you may want to consider asking for a POC (Proof of Concept). This is a simple feasibility study that will help to verify that the concept will work in principle.

Keep the costs to a minimum during this stage. If a vendor tells you they can do something, ask them to show you how. They may need to create technical links to your existing system so that the prototype can be tested. Now is a good time to get users involved. Get them using the system and trying it out in real time. If they have any problems or queries, they should make detailed notes. This is an essential stage of the process as once the CRM is in place and purchased, it needs to work well and improve the company systems, saving time and money.

## MAKING YOUR FINAL SELECTION DECISION

The scoring system mentioned above should indicate the best performing systems, but that doesn't mean you should use it as the sole basis for your decision.

A high-scoring system is worth considering, certainly. However, there are instances in which you might want to disregard the highest-scoring demo in favor of another decision, including:

*"Contract negotiations are tricky, and if it all falls through at the last minute you'll be glad you selected a second choice whilst the demos were still fresh in your mind."*

- **Vendor instability:** if their system is a perfect fit but their financials leave a lot to be desired, it's probably best to move on
- **Vendor culture:** the people you'll be working with are as important as the product itself. If your cultures clash
- **Pricing point:** if your best-performing system is just out of your reach price-wise, you might want to reconsider. If it is so far out of range that it's a pipedream you may need to reconsider.

Call your team together and agree on your first choice. Here, it's always worth deciding on a backup option as well. Contract negotiations are tricky, and if it all falls through at the last minute you'll be glad you selected a second choice whilst the demos were still fresh in your mind.

As a side point: if none of the systems you demoed were up to meeting your needs, do not feel pressured into making a decision for the sake of it. No selection decision is better than a bad selection decision. Go back to the vendor shortlisting stage and do some research - if you need to speed the process up you could skip the RFP phase in favor of recommendations from your network and direct conversations with vendors.

## CONTRACT NEGOTIATION

Congratulations - if you've made it this far you've navigated the demo phase of your CRM selection project, and presumably found a system that meets your key requirements adequately.

The next step is to contact the vendor and begin contract negotiations. From here on in, do not do anything without consulting your company's legal team. Many a failed implementation and poor CRM partnership have fallen apart because of contract disputes, and given the amount of time you've spent finding the right system, you want to give this partnership the best possible shot at success.

**Good luck.**

# 6. A TEMPLATE STRUCTURE FOR YOUR CRM DEMOS

The following template agenda has been set out for your use in planning your CRM demos and during the demonstrations themselves. You can customize as you wish, and as suggested in the guide, circulate it to the vendor and the team in advance of the meeting taking place.

**It will save valuable time by keeping the CRM demo on track,** and progressing on your terms, rather than allowing the vendor to chair proceedings or proceeding in a less structured way.

First, ensure there is space on your evaluation forms to record the following information:

- Date of meeting
- CRM system vendor
- Chairperson
- Start/finish time
- Location
- Attendees

**This is both good practice and a way to jog attendees' memories** of a particular system, once CRM demo-blur sets in!

## A TEMPLATE CRM DEMO AGENDA

Obviously, different companies' agendas will vary somewhat due to differing needs - an organization looking for a CRM for sales only won't be too bothered by marketing functionality, for example.

Nevertheless, the structure below should, with some customization, serve as a fairly comprehensive guide to planning your CRM demo.

**Company introduction.** To cover: history, markets, previous systems used, goals, overview of current CRM and reasons for changing

**Vendor company introduction.** To cover: history, values, markets served, typical projects

**CRM demo - main body.** To include (delete as appropriate):

- High-level system overview
- IT requirements of CRM system (e.g. cloud-based or server-based, remote access by app or VPN, compatible devices, integrations with accounting/order processing systems and other services and data sources)
- Marketing functions
- Sales functions
- Customer service functions
- Finance functions
- Operations functions
- Management functions
- Reporting
- Future development (e.g. how is the system adapting and evolving, how often are software updates typically rolled out, what are some of the future functions and integrations that are scheduled to be rolled out in the next 2 years)
- Compliance and data protection (how does the system safeguard sensitive company and customer data from viruses and hacks)
- Case study of a typical install

**Break and refreshments:** allow 15 mins to half an hour for everyone to recuperate

**Software support and aftersales service overview.** To include: pre-installation training, data migration, installation timescale, go-live strategy recommendations, software support options, update information, customization options

**Q&A session.** Include hypothetical scenarios from all departments and functions present, cost analysis, and ask any further questions you have about the demo

This guide was written by Rick Siderfin and Jane Tareen, Discover CRM columnists, with contributions from Kathryn Beeson, Discover CRM Editor

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