

# CRM SOFTWARE SELECTION CHECKLIST

Over 100 actionable steps to CRM selection success

## GUIDE HIGHLIGHTS



Building a representative  
CRM selection team



Researching and refining a  
CRM vendor shortlist



Arranging demos and making  
a final selection decision



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This guide helps you plan and execute the six major stages of CRM selection. The sections below are broken down into several smaller steps to keep you on top of key tasks:

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## BRING TOGETHER A SELECTION TEAM

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CRM selection is hard work. You won't be able to do it alone.

By that, we don't mean 'it's quite time-consuming and may drain some of your time away from regular work duties.' We mean 'it is actually impossible even if you're the most talented and efficient project manager in the world.' To guarantee success at the requirements gathering stage and beyond, you need to ensure that all key stakeholders are represented in the decision-making process.

Again: *CRM selection is hard work*. You'll need talent to make your selection project a success, so when you're recruiting, make sure to incentivize people to join you - free lunches, cash bonuses, extra PTO are some ideas to start with.

### RECRUIT YOUR SELECTION TEAM

- Advertise for team members on internal company channels
- Consult with heads of department for promising candidates
- Promote team membership perks (e.g free food, cash bonus, extra PTO)
- Identify a C-level/senior management sponsor for your project
- Recruit representative from each key stakeholder group, as well as technical and managerial functions
- Create a CRM selection timeline for:
  - Requirements gathering
  - Vendor shortlisting
  - Demos
  - Final selection decision
- Draft implementation timeline as a reference point for further discussion with vendors
- Agree specified roles within team:
  - Project manager
  - Spokesperson (to potential vendors and internally)

## **HIRE A CRM SELECTION CONSULTANT**

- Decide whether you need a CRM selection consultant
- Define scope and timeline for external consultancy resources
- Ask professional network for consultant recommendations
- Shortlist and interview potential consultants
- Hire chosen consultant and begin onboarding process

## **CRM SELECTION TEAM CHECKLIST**

- Project manager
- C-level/senior management sponsor
- IT department representative
- Selection consultant (if using)
- Stakeholder representatives from:
  - Sales
  - Marketing
  - Operations
  - Accounts and finance
  - Customer service
  - Middle management/heads of department



## IDENTIFY YOUR REQUIREMENTS FOR A NEW CRM

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Before jumping into researching systems and creating a shortlist, you and your team should conduct an extensive requirements gathering exercise. This is where your stakeholder representatives really come into their own; no-one knows the sales team's requirements for contact management like a sales rep, for example.

Be sure to manage expectations here. Emphasize that you are requirements gathering and that not everything mentioned in discussion will necessarily be provided by your new CRM - you will have a budget to stick to, and some requirements will have to be prioritized over others.

### CREATE A REQUIREMENTS GATHERING PROCESS

- Create a map of current business practices to identify bottlenecks in efficiency
- Identify where your current CRM (if you have one) is no longer fit for purpose
- Identify key business challenges you want a new CRM to solve
- Identify future business goals you want a new CRM to support
- Consult each department on their current challenges and desired features for a new CRM
- Create a provisional list of requirements and assign priority to each

### MAP OUT YOUR FEATURE REQUIREMENTS

- Sales (e.g custom pipelines, sales forecasting)
- Marketing (e.g social media integration, web-to-lead form builder)
- Operations (e.g customer contact and address storage)
- Customer service (e.g custom ticket status, parent-child ticketing)
- Accounts/finance (e.g invoicing)

### IDENTIFY TECHNICAL/SYSTEM REQUIREMENTS

- Number of users
- Deployment (cloud vs on-premise)
- Mobile functionality (web app, native iOS/Android app)

- Offline system access
- Language and currency
- Integration
  - ERP
  - Accounting
  - Marketing automation
  - Storefront/e-commerce
  - G-Suite
  - Email

## IDENTIFY SUPPORT AND SERVICE REQUIREMENTS

- Support scope and delivery method (phone support, online support)
- Training scope and delivery method (classroom training, on-site training)
- Implementation consultancy
- External project management
- Data protection and security compliance requirements
- Identify critical data sets in your legacy systems
- Document data migration requirements for these critical data sets
- Identify external requirements for system and network maintenance



## CREATE A CRM SOFTWARE BUDGET

This is probably the most difficult step in the selection process. Overestimate your budgetary needs, and senior management may dismiss your project as an unnecessary expense. Underestimate it, and questions will be asked when you start exceeding it.

The key here is to work from the out-of-box price outwards. CRM vendors are relatively transparent about their pricing plans, so find a couple aimed at your type of company and use them as a base. From there, add on implementation and training costs, any consultancy fees, and adjust for inefficiencies while you set up the system and get your workforce used to working with it. It's also a good idea to add a 10% 'buffer' to your final figure in case of project overrun or unforeseen expenses.

### CREATE A SOFTWARE BUDGET

- Estimate out-of-box price of system
- Forecast cost of consultancy fees
- Forecast cost of vendor implementation services
- Forecast cost of hardware upgrades (e.g company smartphones for mobile CRM)
- Forecast cost of support package
- Forecast cost of staff overtime during implementation
- Forecast cost of extra temporary staff during implementation
- Add 10% 'buffer' to your final figure in case of project overrun or unforeseen expenses

### FORECAST POTENTIAL ROI OF NEW CRM SOFTWARE

- Set a timeframe for TCO and return calculations
- Forecast the value of each system requirement within the specified timeframe
- Develop a change management plan including efficiency loss during implementation
- Forecast costs for the new system within the specified timeframe
- Work with analysts and finance to produce final ROI forecast figures
- Compare ROI forecasts for the new CRM with those of other prospective points of investment
- Report on ROI forecasts to senior management
- Receive sign-off on your projected budget



## CREATE A CRM VENDOR SHORTLIST

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You're at the 'selection' stage of your selection project now. You know what you want your CRM to do, and you know how much you'd like it to cost. All you need to do is to find CRM vendors who meet those criteria. Easier said than done when there's so many to choose from.

An RFP (Request for Proposal) is a great way of assessing whether a vendor you like the look of is a viable option for a long-term business relationship. Be as specific as possible when compiling this - the more detail you give on your company, project, and key requirements, the more chance potential vendors have to shine. You'll have more information to evaluate them on too!

### CREATE A VENDOR SHORTLIST

- Research CRMs used by similar companies to your own
- Reach out to professional network for recommendations
  - LinkedIn
  - Old colleagues - what are they using now?
  - New colleagues - what did they use in their previous job?
- Use online resources to collect information on potential systems
  - Review sites
  - Quora
  - User groups and forums
- Identify industry-specific CRM solutions (e.g real-estate, recruitment)
- Identify competitors to vendors you have researched
- Optional: produce an RFI document and send to shortlisted vendors
- Narrow shortlist based on RFI responses

### CREATE AN RFP DOCUMENT TO SEND TO VENDORS

- Introduce:
  - Your company
  - Your reasons for selecting a new CRM

- Your project's scope, including a loose budget and a timeline detailing every major step from RFP through to go-live
- Outline all identified CRM requirements and their priority, and provide space for vendors to detail how they can meet them
- Request references from at least three companies of a similar size/industry to your own
- Include a deadline for RFP responses and information on when you'll be in contact
- Send out RFP to shortlisted vendors and await responses



## INVITE SELECTED CRM VENDORS TO DEMO

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Once you've received responses to your RFPs, it's time to start making some solid decisions. Score the responses on a set of criteria agreed on by your selection team to get an idea of the best systems for your needs. Invite your three to five (absolute max) most promising vendors to show you their system in a live environment.

As a physical meeting, demos take planning. Don't ignore the obvious. Potential vendors are scoping out your viability as a long-term business partner too, and failing to book a suitably-sized meeting room or to provide the necessary hardware for the demo to run will make you look unreliable and unprofessional.

### EVALUATE RFP RESPONSES TO PRODUCE FINAL VENDOR SHORTLIST

- Agree on criteria and scale for RFP evaluation
- Automatically rule out late or incomplete proposals
- Get selection team members to rank vendor proposals according to scale
- Average out selection team's responses to proposals
- Discuss scores in selection team meeting; invite 3-5 best proposals to demo their product

### ARRANGE DEMOS WITH EACH VENDOR ON FINAL SHORTLIST

- Identify who you want to attend demo
  - Your company
  - Your reasons for selecting a new CRM
  - Your company
  - Your reasons for selecting a new CRM
- Identify how many people will be attending demo and book adequately-sized meeting rooms
- Book refreshments for intervals
- Ask vendor rep for technical requirements (e.g projector) and ensure their needs are met
- Create script for vendor demo and send it to shortlisted vendors
- Identify hypothetical real-life scenarios for vendor representative to tackle during demo



## MAKE A FINAL CRM SELECTION DECISION

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After the demos are over, you should, hopefully, be left with at least one CRM vendor that you think you could work with. If you haven't, don't make a selection decision for the sake of it. Taking extra time to re-shortlist and schedule a few more demos is infinitely better than rushing and selecting a poor-fitting system for the sake of it.

Most importantly: do not sign anything without consulting your company's legal team beforehand. Any provisional contracts should be forwarded to them to be run through with a fine-tooth comb before any action is taken.

### MAKE YOUR FINAL SELECTION DECISION

- Produce RFQ document and send to all vendors that were demoed
- Assemble selection committee to review all RFQ responses
- Make final selection decision and proceed to contract negotiations
- Agree on second choice in case contract negotiations with preferred vendor fall through
- Agree terms of purchase and implementation with your chosen vendor
- Deliver documentation including vendor commitments and contacts to the implementation team

This guide was written by Kathryn Beeson, Discover CRM Editor

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