DIGITAL REPUBLIC

Process for bying and implementing a new CRM

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WHEN BUYING A NEW CRM YOU HAVE TO:

Ask yourself this question:

Have I or someone else in our company ever successfully implemented a CRM before?

If you haven't implemented a CRM before, you don't know what the process looks like and you don't know exactly what to do.

Today many people turn to Chat GPT or Google to search for the best possible process to implement a complex and business critical system, but the result will not get you the entire way.

You need to know how to make decisions, who to involve, how to chose between different solutions, how to handle stakeholders, run a project, guide change in your organization.

Understand the value of a CRM

How should this affect your customers?

One of the key drivers for customer loyalty is trust. If your customers have the feeling that you work together to help, support, enable, create for them, the sense of belonging rises. Your customers can benefit from you having a CRM.

How should this affect your employees?

Your employees can be more efficient with utilizing tools like HubSpot. They gain more insights about their customers and will be able to create more value. The collaboration between departments will increase and there will be one single point of truth when finding informations.

How should this affect your profitability?

Being able to deliver a accurate forecast will support you in making better decisions, allocate resources and plan ahead. This will increase your profitability and gain value for your compa

CRM SELF ASSESSMENT

Question	1	2	3	4	5
Do you have a clear understanding of what CRM entails, its benefits, and how it aligns with your company's goals and processes?	I have no clue		We have discussed it		It is crystal clear!
Evaluate your ability to allocate resources, both financial and human, towards CRM implementation. This includes budgeting for software licenses, training, and hiring or reallocating staff for implementation and ongoing management.	I don't know how many resources I need or what it costs		We know what it takes but doesn't have own resources		We have enough resources and can allocate it
Consider your leadership capabilities in driving organizational change. Are you capable of articulating a vision for CRM implementation and inspiring your team to embrace it? Effective change management skills are crucial for successful CRM adoption.	I don't know what it takes?		We might not have the capabilities to make the change ourselves.		Our leaders have the capacity and competences
Assess your company's proficiency in data management. CRM systems rely heavily on accurate and up-to-date data. Evaluate whether your team has the skills and processes in place to collect, clean, and maintain data effectively.	We don't have any insight into what data we have or where they are.		Its complex and we think we know most of it.		We know exactly what we are doing

GUIDING PRINCIPLES FOR BUYING A NEW CRM

Decisions to make

What is the purpose of a new CRM?

Assess needs and goals for start using a new CRM. What do we want to achieve? Improve, Reduce, Eliminate, Establish.

Understand the CRM landscape

What are the different systems out there? HubSpot, Salesforce, Microsoft should be evaluated...

Who are involved?

Who is responsible?
Who are accountable?
Who will be involved extensively?
Who should be informed?

Leadership capacity and inventory

Depending on your experience you have either done this before or you haven't. The project will reflect that and you will need support accordingly.

Choose your project plan

There are many ways to implement a CRM and that depends on the complexity of your company, integrations to other systems and the people involved

DECISION TIMELINE

Decisions to make

START HERE

1

What is the purpose of a new CRM?

- Why do we need a new CRM
- What do we want to accomplish?
- What should be the impact?
- What happens if we don’t do it?

2

Understand the project

- Have we ever done this before?
- What do we know about CRM?
- Who internally will own the project?

STOP

3

Gathering requirements

- What is the best scope for us?
- What features and functions are we looking for?
- Input from entire company
- Building the business case
- Understand the cost of doing business

4

What could possible go wrong?

- No Budget
- No Ownership
- No Leadership Capacity
- Building the wrong internal team
- No objectives for the project
- Poor requirements gathering
- No executive support
- Wrong platform

STOP

5

Vendor evaluation

- Gather information about the right vendor/s
- Evaluating capabilities
- Evaluating cases

6

Final project scope

Detailed design of project
Decide on process
Evaluate project plan

7

Decision to start or ditch the project

Final sign off on project

STOP

8

Project planning

9

Project delivery

SOFTWARE ASSESSMENT

Some of the principles of assessing CRM software

Identify critical requirements

Understand the unique requirements of B2B interactions, such as managing complex sales cycles, nurturing long-term relationships with clients, handling multiple contacts within a single account, and supporting account-based marketing strategies.

01

How will you manage the pipeline?

Evaluate the CRM's ability to customize and manage the sales pipeline according to the stages of the B2B sales process. Look for features such as opportunity tracking, lead scoring, sales forecasting, and deal management tailored to B2B sales cycles.

02

Stakeholder management

ssess the CRM's capabilities for managing accounts and contacts, including the ability to link multiple contacts to a single account, track interactions with key stakeholders, and segment accounts based on various criteria such as industry, size, or location.

03

Analytics and reporting

Evaluate the CRM's reporting and analytics features to gain insights into sales performance, customer behavior, and pipeline health. Look for advanced reporting capabilities that allow for customized reports, dashboards, and visualizations tailored to B2B metrics and KPIs.

04

SOFTWARE ASSESSMENT

Some of the principles of assessing CRM software

Mobile access

Assess the CRM's mobile capabilities to ensure that sales representatives can access critical information, update records, and communicate with clients on the go. Mobile accessibility is essential for field sales representatives who need real-time access to customer data.

05

Collaboration and team selling

Consider features that facilitate collaboration among sales teams and other departments involved in the B2B sales process, such as shared calendars, task assignments, document sharing, and communication tools like internal messaging or collaboration channels.

06

Customization and scalability

Look for a CRM that offers flexibility for customization to adapt to the unique workflows and processes of the B2B company. Assess the platform's scalability to accommodate growth and changes in business needs over time.

07

Security and Compliance

Consider the CRM's security features and compliance with data protection regulations, especially if dealing with sensitive customer information in B2B transactions. Look for features such as role-based access control, data encryption, audit trails, and compliance certifications.

08

SOFTWARE CHECKLIST

Identify critical requirements

1. Lead Management: Ability to capture, categorize, and track leads efficiently.
2. Contact Management: Comprehensive database for storing and managing client and prospect contacts.
3. Integration Capability: Seamless integration with existing tools and systems such as email, marketing automation, and ERP.
4. Data Import/Export: Easy import/export functionality for mass data transfers.
5. User Interface/User Experience (UI/UX): Intuitive interface for easy adoption by all users.

01

How will you manage the pipeline?

1. Customizable Sales Stages: Ability to configure and tailor pipeline stages to match the company's sales process.
2. Forecasting Tools: Predictive analytics and forecasting features to estimate future sales performance accurately.
3. Deal Tracking: Detailed tracking of deals through each stage of the sales pipeline.
4. Automation: Automation of routine tasks like follow-ups and notifications to streamline pipeline management.
5. Activity Logging: Comprehensive logging of sales activities for transparency and accountability.

02

Stakeholder management

1. Contact Segmentation: Ability to segment contacts based on various criteria for targeted communication.
2. Communication History: Record of all interactions with clients and prospects for better relationship management.
3. Task Assignment: Capability to assign tasks and responsibilities to team members within the CRM.
4. Customer Feedback Integration: Integration with feedback mechanisms to capture and analyze customer feedback.
5. Customer Journey Tracking: Tracking of customer journey from lead to conversion and beyond for personalized engagement.

03

Analytics and reporting

1. Customizable Reports: Ability to generate customizable reports tailored to specific business needs.
2. Real-time Dashboards: Real-time dashboards for quick insights into sales performance and trends.
3. Sales Funnel Analysis: Analysis of the sales funnel to identify bottlenecks and optimize the sales process.
4. Revenue Forecasting: Accurate forecasting of revenue based on historical data and current trends.
5. KPI Tracking: Tracking of key performance indicators (KPIs) to measure sales team performance and effectiveness.

04

SOFTWARE CHECKLIST

Mobile access

1. Mobile App Compatibility: Availability of mobile apps for iOS and Android platforms.
2. Syncing Capabilities: Seamless syncing of data between desktop and mobile devices.
3. Able to call, send email and perform sales activities directly in the application.
4. Security Measures: Robust security measures to protect data accessed through mobile devices.
5. User-Friendly Interface: Intuitive mobile interface for ease of use on smaller screens.

05

Collaboration and team selling

1. Team Collaboration Tools: Built-in tools for collaboration among team members, such as chat or discussion forums.
2. OnlineCalendars: Calendars for scheduling meetings and appointments with clients.
3. Document Sharing: Capability to share sales collateral and documents within the CRM platform.
4. Team Activity Feeds: Activity feeds to keep team members updated on each other's progress and interactions.
5. Role-based Access Control: Granular control over access permissions to ensure data security and confidentiality.

06

Customization and scalability

1. Custom Fields and Layouts: Ability to add custom fields and customize layout to match specific business requirements.
2. Workflow Automation: Customizable workflow automation to streamline processes and adapt to changing needs.
3. Scalability: Ability to scale the CRM system as the business grows without compromising performance.
4. API Access: Access to APIs for integrating with third-party applications and extending functionality.
5. Data Migration Support: Support for seamless migration of data from legacy systems and other CRMs.

07

Security and Compliance

1. Data Encryption: Encryption of data both in transit and at rest to prevent unauthorized access.
2. Access Control: Role-based access control to limit access to sensitive data based on user roles.
3. Audit Trails: Detailed audit trails to track user activity and changes made to CRM data.
4. Compliance Standards: Compliance with relevant industry regulations such as GDPR, HIPAA, or SOC 2.
5. Regular Security Updates: Regular updates and patches to address security vulnerabilities and ensure system integrity.

08

CRM ADOPTION

What affects the successful implementation

Executive support

- Have executives actively use the CRM during meetings (e.g., pulling up live dashboards).
- Communicate clear leadership messages about the importance of CRM adoption.
- Assign an executive sponsor to champion the project internally.

01

Alignment with company strategy

- Tie CRM implementation goals directly to strategic initiatives (e.g., customer-centricity, growth targets).
- Ensure CRM reporting supports strategic KPIs that leadership tracks.
- Regularly review and adjust CRM usage to align with evolving business strategies (e.g., new markets, M&A activities).

02

Culture and readiness for change

- Involve key influencers and "early adopters" in the rollout planning.
- Celebrate quick wins and adoption milestones openly.
- Provide psychological safety by acknowledging that learning new tools can feel uncomfortable at first.

03

Clear link to personal and business goals

- Show how CRM helps users hit their KPIs (e.g., faster deal closures, better follow-ups).
- Share success stories of employees who achieved better results using the CRM.
- Translate business goals into practical CRM workflows (e.g., pipeline stages reflect real sales processes).

04

CRM ADOPTION

What affects the successful implementation

Communication around the change

- Launch a structured communication plan with regular updates via email, intranet, and town halls.
- Run Q&A sessions and feedback forums throughout the implementation.
- Explain the “why” behind the CRM change, not just the “what” and “how.”

05

Governance and Ownership

- Establish a CRM governance team or steering committee to oversee usage, development, and priorities.
- Define clear roles and responsibilities (e.g., system owner, data steward, change manager).
- Set up structured policies for data standards, system changes, and user access control.

06

Data hygiene and data quality

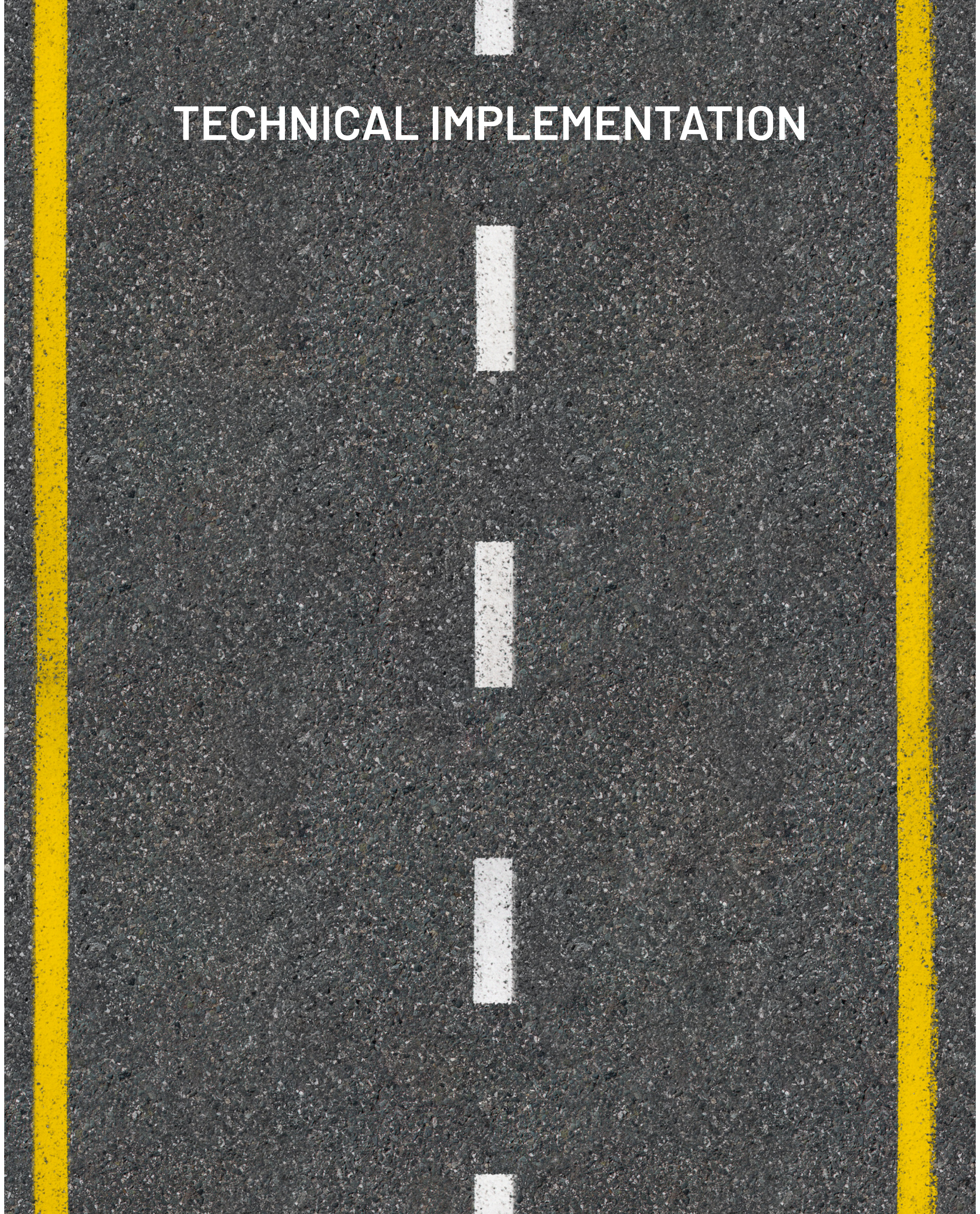
- Set up validation rules to prevent bad data entry (e.g., mandatory fields for new deals).
- Regularly clean and audit CRM data (e.g., quarterly database clean-up days).
- Train users on what "good data" looks like and why it matters.

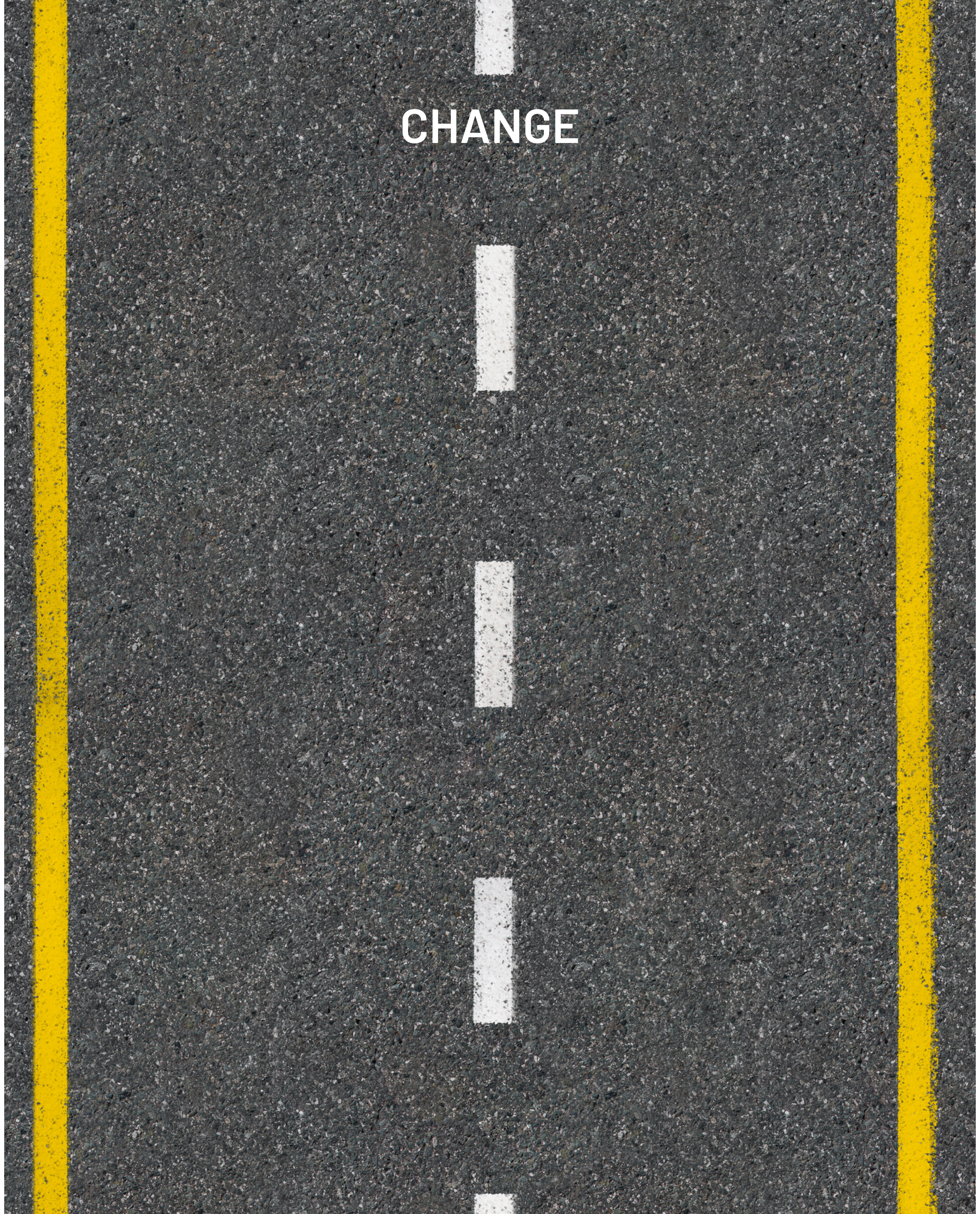
07

Training and onboarding

- Provide role-specific CRM training sessions (not just generic ones).
- Offer a “buddy system” where experienced users help new users.
- Create a library of short, focused video tutorials for on-demand learning.

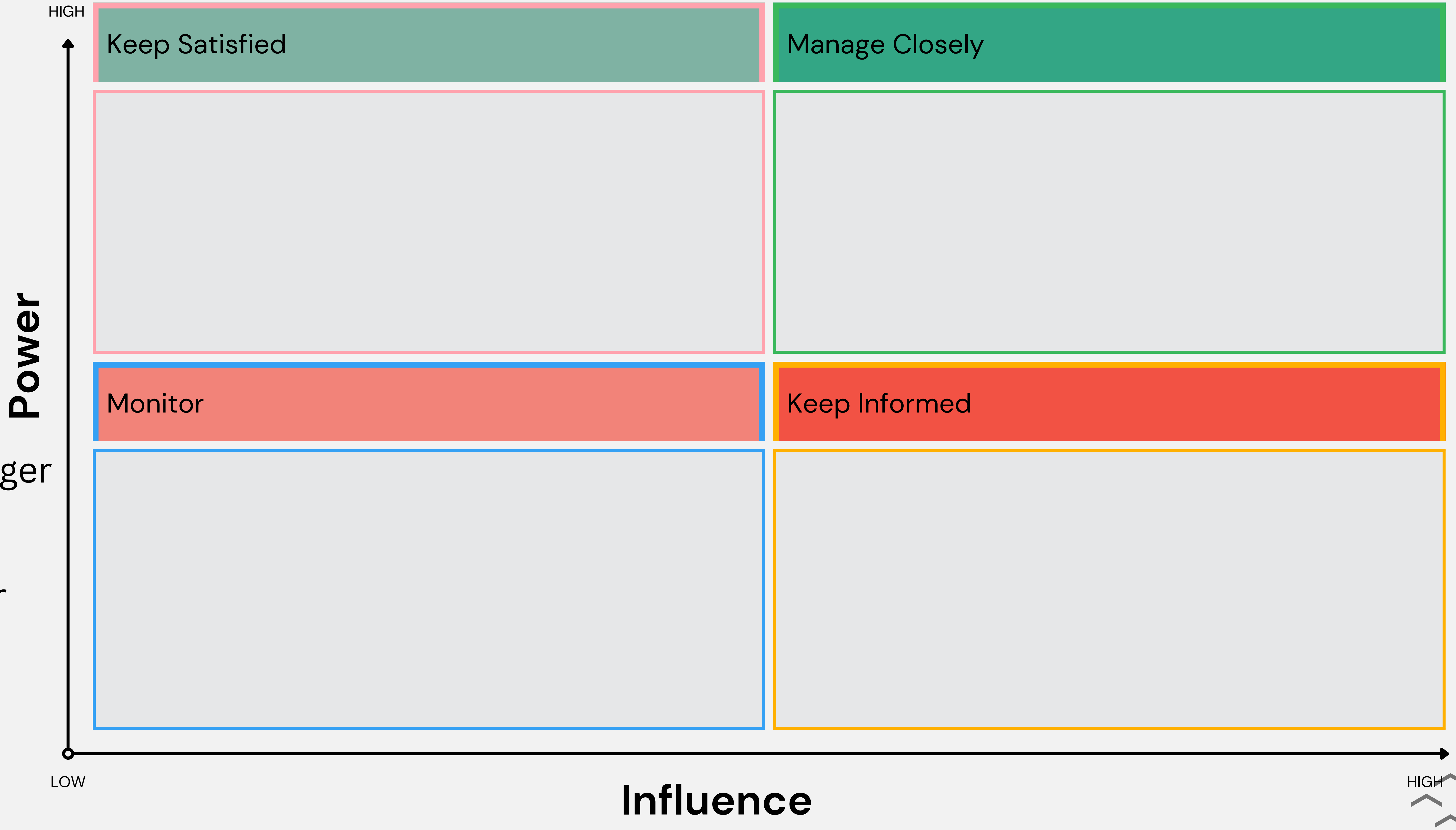
08


TECHNICAL IMPLEMENTATION

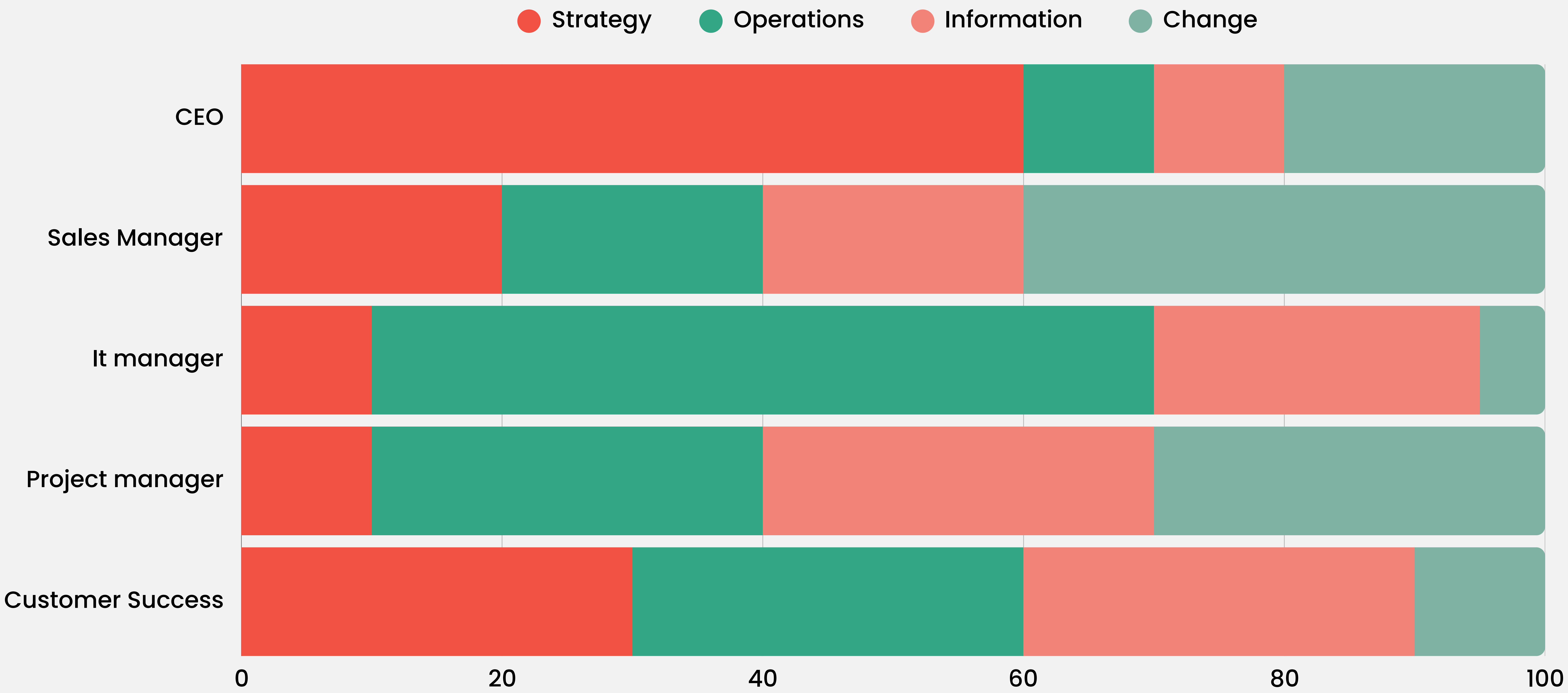

CHANGE

INTERNAL STAKEHOLDER MANAGEMENT

- Board member
- CEO
- COO
- Sales Manager
- It Manager
- Marketing Manager
- Project Manager
- Sales rep



DISTRIBUTION OF LEADERSHIP CAPACITY



WORKING WITH AN IMPLEMENTATION PARTNER

How to select a vendor

Do they understand your business

Every business is unique and it is important that the vendor understands your business and cool if they understand the industry.

Expertise

Do they have any accreditations that shows their capabilities? Implementing a CRM is not just about the it-system - it is change management, stakeholder management and project management.

Do you feel inspired??

Working within the commercial area is a matter of continuous improvement. The market changes, new competitors arises, new technology appears and you have to stay ahead of the curve. Will the vendor help you do that??

Reputation and track record

Get some insight into their previous projects and get an understanding of their experience. Who will be working on your account - just because the company can flash some impressive brands it doesn't mean that the team has worked those clients...

Implementation Methodology

What does the process looks like and is it making any sense for you. Ensure that you fully understand the rationale behind the process and you can submit to the process.

THE WAY TO A SUCCESSFUL PROJECT

1. Understand where you start

Acknowledge your current position, your existing knowledge, and your requirements. Seek assistance from the outset, understanding that it's perfectly acceptable not to possess all the answers from the start.

2. Get help if you need it

The world is full of failed CRM projects. Start out with small solutions that works for you and get some traction. Seek help from specialists and ensure they know what they are doing.

3. Chose the right CRM system

Understand the eco-system and check out the different solutions. Make sure you see a live setup that actually works and not just a fancy powerpoint.

4. A good implementation plan

Make sure the plan makes sense. If it is going too fast, you will miss important steps. If it is going too slow, you will lose commitment.

5. Never underestimate your employees need for support to change

Change management is extremely important. You need to have people to follow even if they don’t want to.
Letting go of “as is” can be hard for everybody, so make sure you get your people in on the journey!

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