

How to Choose the Right CRM

**Tips to Navigate the
Unknown and Select
the Best CRM for You.**





It All Starts with **Change**

Choosing What's Right for You



Industry Efficiency

Tools on the market today are created to solve a gap in efficiency or process.



CRMs Help Streamline

A CRM can help automate processes for everyone in a company, from a sales team, to marketing, to human resources.



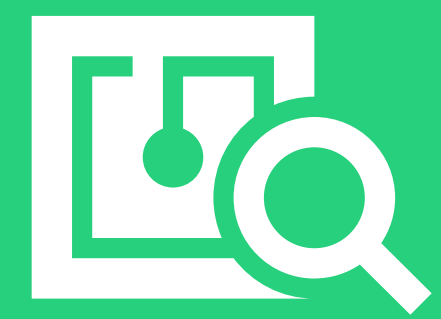
Choosing What's Right

There are thousands of hardware and software options available to help you grow your business. Investing in a CRM is one of the most important.

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**It is Important to Embrace
Technological Changes to
Become More Efficient, and In
Turn, Maximize Profitability.**

”



Assess Your Needs

Before you start thinking about purchasing CRM software, you need to sit down and answer a few questions:

- Why do I need this?
- Who will it help in my company?
- Who will be the primary user?



Ask Around

CRMs are not new – If possible, ask colleagues which platform they chose, and why! Also – be sure to ask what they do and do not like.

- Pro Tip: Friends who have recently purchased a platform are invaluable because they have already done the work for you!

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Who Do Your Competitors Use?

Analyzing who your competition uses is a great way to gauge relevancy to your industry. If they are using a tool to maximize profitability, it's best to know where they have seen success, so you do not make the same mistakes in choosing.



Existing Software?

Often called Partners or Integration Partners, companies will link their systems together to create one ecosystem, allowing for a seamless and cohesive integration between the two platforms/services.

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Schedule a Demo With CRMs on Your Short-List

After you have done the legwork, it is time for the demo! Although it can be annoying to sit through a (yet another) sales pitch, it is important for you to have this time to see the power each CRM must impact your business.

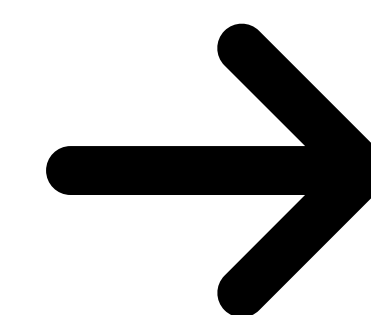
- Pro Tip: Ask the tough questions! Have a list of prepared questions and a checklist of “must haves.” Do not leave that demo until you know everything you need to. Remember, feel free to let CRMs know that you’re shopping around for CRMs – A good question to ask yourself (and them) is “What makes yours a better choice for me over your competitors?”

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Looking For CRM Recommendations?

Don't worry – Leap Integrates with plenty of
CRMs. Here are some our top recommendations:



**Ready to
Get Started?**

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