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How to Choose the Right CRM For You

With any purchase, especially in the tech space, there is hesitation with the unknown.

It is important to embrace technological changes to become more efficient, and in turn, maximize profitability. Most tools on the market today are created to solve a gap in efficiency or process. Did one of your sales reps in the field forget the new price book in the office? Are you entering your contacts into an “old-school” phone book? Are you writing out contact information, estimates and contracts on carbon-copy pads? Is your business process hinged on the sales team getting their forms back to you in time? While this may be commonplace in the industry, are these the most streamlined processes?

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. A CRM is a Customer Relationship Management tool that lives online to help with administrative data in an organization. A CRM can help streamline processes for everyone in a company, from a sales team, to marketing, to human resources. In a CRM, you can house all important information for anyone in your company to access (based on permissions) like customer information, leads and prospects, and sales interactions. It can also provide clear communication to customers, staff, and relay tasks and appointments to your teams. A CRM can be one of the most powerful tools you use in business today.

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In this guide, I will walk you through selecting a CRM. Whether it is your first time, or you are looking to replace your current operating system, you can use this to aid in the selection process.



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1. Assess Your Needs

This goes without saying, and yet, here I am, saying it! Before you start thinking about purchasing CRM software, or anything for your business for that matter, you need to sit down and answer a few questions...

- Why do I need this? Are your contracts constantly missing information? Or maybe your team has no idea where their appointments are and when, and even worse, with who! Have a hard look at your current processes and think about where your gaps are. Everyone has process gaps, but those that excel are the one who look to solve them!
- Who will it help in my company? If you are looking to help only the sales team, that is most likely because that team is home to most glaring process gaps, but don't overlook the other departments in your organization. They could have experiences that a CRM could solve!
 - **PRO TIP: Ask for help! The people who know the process gaps the best, are those on the team. Ask for a report on gaps from each department!**
- Who will be the primary user? This is important so that you can find the right interface (how it looks). Some CRMs have different interfaces, some only have one. Regardless, different people perceive what they are looking at differently. You will want to identify who the primary users and administrators are and find out which US (User Experience) would work best for them.
 - **PRO TIP: Ask the primary users what their favorite app to use or easiest website to manipulate is. That will give you a starting point!**

2. Who do your friends use?

Ask around! CRMs are not new, so chances are someone you know in the industry (or out of the industry) are using one! Ask 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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3. Who do your competitors use?

This is the same idea as asking your friends, with one major caveat...these guys are the ones you are going head-to-head with daily. If they are utilizing a tool to maximize profitability, would you at least like to know what tool that is?

4. Do you already have software that should be integrated?

As we continue to trudge forward into technological advances, there will be opportunities to connect, or integrate, those tools seamlessly. Often called Partners or Integration Partners, companies will link their systems together to create one “eco-system.”

Think about it like the home security devices. You can now get a camera, that will notify your phone if someone is at the front door. If they ring the doorbell, your smart speaker will notify you. All these items were purchased separately but work seamlessly.

What program do you use for marketing emails and campaigns? billing? scheduling? See if these programs have partnerships with a CRM!

5. Schedule a demo with each CRM 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. And feel free to “tell it to ‘um straight” by saying... “We are shopping around for CRMs, what makes yours a better choice for me over your competitors?”**

Selecting the right technology to add to your growing toolkit can be daunting, and may feel tedious, but taking the time to find the right fit for you is just as important as any other area of your business.



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[Looking for a CRM? You're in Luck!]

Leap Integrates with many CRMS!



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