

# 10 questions to ask when choosing your new CRM

Our infographic takes you through ten key questions you need to ask when evaluating different CRM solutions for your business.

## 1 Does it do more than contact management?

CRM has become more complex. You need a 360° view of your customers so make sure you can bring together your sales, marketing, customer service, order management, billing and finance

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## 2 Is it scalable?

Make sure your CRM can grow with you. Can you easily add new users? Choose a solution that can offer extended functionality if and when it is required, such as financials and order management

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## 3 Can it be tailored to your business?

Look for a CRM that can be customised to your business needs. Does the vendor offer any industry-specific solutions?

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## 4 Does it have good reporting & analytics tools?

Any CRM that doesn't have easy-to-use dashboards, reporting and analytics tools is not worth the investment

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## 5 Is it on-premise, hosted or 'true' cloud?

Do you need anytime, anywhere access? Make sure you fully understand the different options and make the right choice for your business

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## 6 Can the vendor provide customer references?

Make sure you find out if potential vendors have experience in your industry by asking for example case studies and references

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## 7 Can you use an implementation partner?

Using a partner can help make your project a success. They also offer a long-term, on-going relationship that can optimise your use of the CRM

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## 8 Is training available?

High quality training is hugely important, so make sure either your vendor or your partner can offer this as part of the service

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## 9 Will you be 'locked-in' with the vendor?

Make sure you find out what happens at the end of the contract. Could you easily move your data out of the system if you wanted to?

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## 10 Will your data be secure?

If you choose a cloud solution, check the vendor has the appropriate security certifications. If you choose on-premise, make sure your IT department can keep your data safe

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