



Choosing a customised IT solution that works for you

Often an IT system that comes off the shelf just doesn't have the functionality that you need. This is why you should ultimately look at a solution that is customised or created specifically for you

When deciding on a solution examine your objectives for the project. "Take a look at your organisation and particularly at your strategies around why you would use the system," says Kevin Kemp of SAS Institute.

Choose a company that can provide the right solution for you

These could range from becoming more customer focused to being able to look at your company as a whole instead of just from the top down.

It is also a good idea to choose a company that will work with you to get maximum usage out of the system. "Many companies will implement a CRM

(Customer Relationship Management) system but they will only use it for marketing initiatives," says Kemp. "You could use it to benchmark yourselves against the industry standard in terms of customer retention and build strategies around that or to measure return on investment in your marketing initiatives. It all revolves around the strategy of what you want to achieve."

Think about the data outputs that you need from your system. These will be based on your ultimate goal. "You can, for example, use systems to drive customer innovation by getting feedback from the system," says Kemp.

Next, you need to look at the complexity of the solution. "Solutions will vary depending on how many users you want accessing the system," says Marilyn Howard of BMH Holdings (Pty) Ltd. "You can have a piece of software that works well for up to 10 000 users, like the Softline ACCPAC CRM system which comes with a lot of flexibility built in. Then you get the Microsoft CRM system which is better for companies with 100 000 users because the system allows for a lot of customisation."

Also look at what software you have already invested in. Depending on your goals for the new solution, it might need to integrate into existing software. A common need is for solutions like CRM systems to be aligned with accounting




packages, so that expenditure can be tracked. Another common request would be integration with Microsoft Office, so that emails and other documents can be tracked and recorded. “If you are using your system for marketing and PR, for example,” Kemp says, “you will want to align it with your finance, sales and e-commerce systems so that you can track your projects fully.”

Scalability is something else to consider. “It is vital to consider growth in a company,” says Howard. “Make sure that the IT company you choose uses scaleable solutions that will allow you to grow as you need to.”

Use a company that can understand your business

Your needs around mobility should also factor into your decision making process. “Mobility is becoming more important,” says Howard. “The next generation of business is looking for solutions that can be accessed via the internet. This allows people to use the system from anywhere.” This is particularly useful for people who travel a lot or companies with a sales force that is on the road.

Upgrading is the final area to consider. Not only should you find out about upgrades and problem solving for the new system, but you should also look at how the development of the system will affect the upgradeability of the other software that you have.

Choose a company that has done work in your industry before and is willing to spend time learning about your business so that they can provide the right solution for you. 

7 questions to look at when choosing a good CRM system

1 Do you have a product or service?

A product will mean that you will want to track workflows more than customers; whereas a service will mean that you want to keep a record of all customers.

2 Do you target mass market or individual users?

If you target mass market, rather than individual users, then your approach to data storage will be different.

3 Are you looking to acquire new customers, retain current customers or a combination of the two?

These strategies will involve tracking purchasing patterns, finding ways to up-sell and looking at the life cycle of the customer.

4 To what extent must your CRM system drive customers’ or shareholders’ information?

Listed companies particularly will want their shareholders to access certain information. Other companies might want their suppliers or customers to gain access to certain information.

5 To what extent do you need to manage cases?

In other words, how extensive do you want your call logging and note taking abilities to be? Would you like each new entry automatically dated?

6 Who needs to access the system?

Some systems allow for certain users to access certain data and other users to view all data. This is excellent if you are dealing with sensitive information.

7 What information would you like to extract?

If your CRM system is built around individual customers then look at having the ability to track the life cycle of a customer, so that you can up-sell to them at certain stages of their life cycle. Also have the ability to benchmark yourself against others in the industry so that you can work on factors to differentiate yourself. A good CRM system will also allow you to benchmark your expectations against customer expectations and market norms. •