

# 8 Steps in Choosing a CRM System

## 1 Ease of Use for the End User:

Your CRM solution should look and feel like your business! It should be reflective of your processes and therefore intuitive to your end-users in terms of functionality and benefit and ultimately its use.

## 2 Fit for Your Organization

When your CRM solution is mapped to your business processes, it will provide for the establishment of “best practices” for your organization. This ensures your organization the ability to effectively manage the acquisition and retention of your targeted clients.

## 3 Customizability

When your CRM looks like your business, it bodes well for its effective usage. When your CRM addresses your business processes it bodes well for a consistency of *data* input and *information* output!

## 4 Price

A CRM solution must be flexible by nature allowing for quick and effective implementation. This “ease of use” fosters instant user adoption. Both of these benefits coupled with a design reflective of your business processes ensure a quantifiable and quick Return On Investment.

## 5 Ease of Implementation

From a technical standpoint, if the design is well conceived, delivering the CRM to LAN users or road warriors is virtually foolproof. Well thought out, customized training should be employed to establish good habits of use, establishing a seamless tool enhancing each users work product.

## 6 Data Synchronization:

Bi-directional synchronization should be seamless and effortless. By providing one button access synchronization becomes as simple as is technologically possible.

## 7 Your CRM Partner

Desktop Products continually evaluates peripheral products designed to provide value to our customers. When we need to develop tools deemed necessary... we will. We, as Frazier Crane would say, are listening, not only to the marketplace but also more importantly to OUR customers.

## 8

