

Five questions to ask yourself before choosing your CRM integrator



Regardless of the CRM software you choose for your business, the success of your project depends largely on the integrator you select. Naturally, during the selection process, you will evaluate each candidate based on criteria such as the hourly rate, his knowledge of the software, and his experience pertaining to your industry. These questions, while relevant, give you only part of the answers.

To help you make the right decision, we suggest you complete your assessment by asking five key questions.

1 What added value does the integrator actually bring?

The wide range of CRM integrators on the market is as diverse as it is varied. Major Big Four-type consulting firms have resources in several countries to meet the complex needs of multinationals, while smaller local companies offer leading-edge expertise and a more personalized professional relationship.

Each firm has its strengths and weaknesses, and it all depends on your needs. Some have a very strategic vision, while others will help you solve a very specific issue. Keep in mind the reasons behind your decision to implement a new CRM software, and evaluate your integrator on his ability to support your changing business needs, both in terms of CRM and the integration with other business systems. Experience in integration with an ERP-type solution can greatly enhance the use of a CRM application.

2 Is the integrator's experience relevant to your project?

The range of possibilities of a CRM software is quite broad. Knowing that your integration partner has five or ten years of experience in the CRM business is not enough. His experience must be relevant to the type of process you want to optimise.

However, too much specialisation can have adverse consequences. If the CRM integrator has never worked in another industry sector, or if he has merely applied the same recipe to all the implementations he has conducted, he will perhaps not be open-minded or creative enough to quickly find innovative solutions to your problems. Whenever possible, it is best to do business with an integrator partner who understands your business problems, but can also apply best practices from other industry sectors to yours.

3 How does the partner expect to overcome potential challenges?

While it is tempting to believe that good planning helps to ensure the success of your CRM implementation, in this type of project, it is not unusual to see a deadline not being met or a project scope be amended during the assignment.

The best partners are precisely those who inform their clients about the impacts of not following certain steps of the implementation methodology, and who take proactive measures to minimize risks. But even with the best of intentions, foreseeing everything is impossible, hence the importance of ingenuity and flexibility. Do not hesitate to ask your integrator to provide examples of how he managed to adapt to unforeseen circumstances.

4 Who will be working on your project? Can you meet these people?

Aptitude is one thing, and attitude is another. During the selection process, the integrator generally includes in his proposal the résumés of all the staff that will be assigned to the project. This information allows you to assess the level of qualification and certification of consultants, but it provides no indication of the culture and values of the integrator. Since this type of project can easily span several months, it is important to make sure that the people who will be called to work together get along.

Ideally, you should meet the people who will work on your project, or talk to clients with whom they have collaborated in the past. You will get a better idea of the integrator's corporate culture and the values that drive his employees.

5 Do you feel like an important client in the eyes of your integrator?

Contrary to popular belief, the size of the consulting firm is not a guarantee of success. Of course, it is important to evaluate the financial stability of your integrator to avoid unpleasant surprises. However, even if your CRM integrator is well established, it is preferable to avoid situations where you are a small fish in a big pond, because you might end up not getting the same level of priority as bigger clients. Conversely, small specialized integrators sometimes become victims of their own success, so their stretched resources are struggling to meet demand.

To determine if you will be treated like a valued customer by your integrator partner, find out instead whether the project is of strategic importance for the integrator. This becomes all the more important when the integrator tries to build on his credibility or start a new practice. The motivation of the integrator is often much more important than its size.

By no means exhaustive, this list of questions shows that your integrator selection process must be done with great care. In getting the answers to these questions, you will find the person with whom you really want to work and the compromises you are willing to make.