



Grilling Your CRM Vendor

Question to ask	Why you should ask it
What CRM functions does your suite provide?	To figure out whether the software has a full range of functions or is really a CRM point product.
If the suite has gaps, do you have partnerships with other vendors?	This provides clues about weaknesses in the product. Get details on the vendor's alliances.
Is your product Web-based?	Web-based CRM is flexible, accessible and secure.
Has your product dealt with customer data volumes similar to ours?	Great functionality and a slick user interface won't help if you have 50 million customers and the vendor's biggest account has 5 million.
Has your product dealt with transaction volumes similar to ours?	To find out the upper limit of the product.
Does your software work with our relational database (or data warehouse) product?	If it doesn't, you might have to migrate data back and forth into the vendor's database.
How do you migrate data from your product into other software packages, and vice versa?	To understand interfaces with ERP and accounting packages. Do you have to write a custom program, or is there a utility? Is data migration even possible?
Can end users extract data so they can use it locally?	To find out if end users can manipulate data without being connected to the CRM server.
Can you provide a published data model?	Some vendors keep the data model secret, but access to the underlying model will allow you to extract the data for other uses, using software you already have.
Is there a development toolbox with templates?	Development templates speed up implementation by giving programmers packaged software they can customize rather than having to write it from scratch.
What is your product's average implementation time?	Vendors and systems integrators are notorious for low-balling this number, so beware.
Does your company provide implementation help, or do you rely on partners to perform the work?	Some CRM vendors partner with systems integrators or consulting companies, while others have in-house consultants. Understand who will be doing the work.
Who are your integration partners, and what are the certification requirements?	Beware the vendor that has only one partner experienced in customizing its product. You'll be at its mercy.
How many other installations of your product are there in our industry? Can you name some?	The vendor's penetration of your particular industry increases the chances it will understand your business problems.

Source: *The CRM Handbook* (Addison-Wesley, 2001)

We welcome you to do your research before committing to your next CRM solution. Check out our other CRM resources on our website at www.gilbertassociates.com/crm.html.