

Switching CRM Guide

A photograph of three diverse business women in an office environment. They are gathered around a table, looking at a laptop screen. The woman on the left is wearing glasses and a dark blazer. The woman in the middle is standing and leaning over the laptop. The woman on the right is wearing a green top and has a large afro hairstyle. The background is a bright, modern office with large windows.

Strategies to determine
the best CRM for your needs

insightly

Intro—It's becoming painfully clear that your current CRM just isn't cutting it.

Before signing up, you were promised the moon. Frankly, now you'd be happy if you could achieve liftoff. The software is clearly robust enough for your company's needs, as evidenced by the CRM's millions of other users. Problem is, it's just too complicated. Simply importing your contacts and linking records took months of effort, not to mention the thousands of dollars you spent with "certified" consultants. And, despite providing countless hours of training, you know end users are still struggling to adopt the system.

To make matters worse, your CRM isn't cheap. In fact, it's really, really expensive. When you factor in the base subscription costs, add-on modules, consultant time, user training, and in-house IT support costs, you're far from a break-even proposition. That's annoying, especially when you consider CRM technology should be a catalyst for increasing sales, decreasing costs, and driving profitability.

Switching to a new CRM is certainly an option. But, what about the costs you've sunk into your current system? If you switched, would you essentially be setting this investment on fire? Are there any alternative CRMs that could meet your needs? Or, are they all basically the same?

Here's the good news: You're not the first person to ask questions like these. This eBook seeks to answer your questions and provide a game plan for switching CRMs. We'll also show how Insightly, trusted by more than **1.5 million users** in 180 countries, can be the perfect CRM for your business.

So, let's get busy!



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Why switch CRMs?

Stop and think about your original motivation for adopting a CRM. If you're like most companies, you were probably trying to achieve one or more of these goals:

- Increase sales revenue
- Convert more leads to opportunities
- Improve customer relationships
- Enhance the visibility of your pipelines
- Provide better customer service
- Decrease acquisition costs
- Connect the dots between sales and project management
- Drive better profitability
- Organize/professionalize your operation

How has that worked out for you? If you're reading this eBook, the answer might be "not very well." In fact, you may be feeling like your CRM has caused you to lose ground. That's doubly frustrating.



Seven warning signs your current CRM is a liability

As difficult as life can be with your CRM, the prospect of essentially “starting over” can seem even more daunting. Should you just be satisfied with the status quo and move onto more “important” matters? Or, is your CRM truly a big enough liability to merit action?

There are countless business owners and managers in the exact same predicament as you. Many like the idea of switching to a more user-friendly CRM that’s easy to get up and running quickly, but some find it difficult to decide if things are really “that bad.”

Are things “that bad” at your company? If you’re not sure, be on the lookout for these six warning signs:

1. Frustrated end users

It’s hard to gain value from your CRM when end users aren’t happy. It’s virtually impossible when they’re downright angry. Spend time to understand the concerns of your end users. Is it too time-consuming for sales reps to locate customer information? Do end users feel like they’re going to accidentally break something? Is the user interface dreadfully outdated? Does the lack of a mobile app inhibit productivity? Are users hopping in and out of different apps for marketing, sales, and service?

End users must feel comfortable with your CRM. If they don’t, you’re fighting an uphill battle that you can’t win.



Considering a switch from Salesforce? [Calculate your savings with Insightly.](#)

2. Constant data roadblocks

Getting data flowing into your CRM seemed like a monumental achievement. Keeping it up to date has proved to be even more complex. For example, your email marketing and customer support databases change daily. To push such changes into your CRM, custom integrations were necessary. These integrations weren't cheap to build, and they diverted your team's attention away from more important matters: closing deals.

What's worse, the integrations always seem to break at exactly the wrong moment.

3. Unavailable (or restricted) features

You may have heard "Yes, our CRM does that," during the sales process, but the salesperson forgot to mention that your plan level doesn't include that feature. And, since the vendor doesn't publish its pricing, you'll get to sit through several more pitch presentations, only to learn that you can't afford the features you need most. In the end, you're stuck with an already expensive CRM that doesn't do everything you need it to.

Why can't CRM companies just offer straightforward pricing plans without all the hidden fees and constant sales pitches?



4. Disillusioned administrators

Your company has an aggressive growth plan, as evidenced by your everexpanding sales team and evolving marketing mix. To keep pace, you demand a lot from your CRM administrators. Your admins are being pulled in many different directions. Requests for new dashboards, reports and integrations is non-stop. Then, when something breaks, everything stops. All of this puts unnecessary strain on your administrators - and your relationship with them.

If your CRM would just work the way it should, your admins would probably be much happier. If only...

5. Stagnant product development

Stop and think. When was the last time your CRM vendor released an innovative feature? (Minor enhancements and bug fixes don't count!) Can't remember? It sounds like your current vendor isn't interested in growing with you.

Wouldn't it be refreshing to have a CRM partner that actually cares about your success? One that understands your business and designs (and thoroughly tests) solutions, aimed at making your company more profitable.

Sure it would! Sadly, that doesn't sound like your current vendor—does it?

6. Negative (or questionable) ROI

If your CFO told you that your CRM has a negative value proposition, would you listen? Probably so, but it's not always that simple.

Measuring ROI from your CRM (or lack thereof) can be a multi-faceted endeavor. This is especially true when you have hundreds of users in the system. Developing a cost-benefit analysis can seem daunting, which is why many in your situation take the path of less resistance and stick with the status quo.

Luckily, you're not afraid to rock the boat - especially when the company is throwing good money after bad.

7. Costly integrations that break

If it's taking weeks or months for your CRM admin team to produce integrations, you may not be using the right tool. Your business likely runs dozens of apps. Some are isolated to one team (e.g. QuickBooks) while others are company-wide (e.g. Slack). The more integrated your CRM is with other apps, the more seamlessly your business will run. Integrations therefore should be no-code or low-code and should be simple to execute.

If they are not, you are likely on the wrong CRM.

The cost of switching

Look before you leap

With so much uncertainty surrounding your current CRM, you might feel like an urgent change is necessary.

But, before you call up your current vendor to cancel, you'll first want to assess the cost of switching. After all, you've invested significant time and energy in your current platform.

Here are a few things to consider:

Monthly subscription fees

If you're already using a cloud-based CRM, there's a good chance that you already budget for this. On the other hand, if you're using self-hosted software, it's important to note that most CRMs these days are priced on a monthly subscription model. If so, you may be locked into a contract for months or even years. Also consider that you may need to run your old and new system in parallel for a short time during the transition.

Infrastructure & device upgrades

How fast is the Internet in your office? Do you have enough bandwidth, or is your WiFi connection somewhat spotty? If you are moving to a cloud-based service, you'll need to take a look at this. Also, consider devices. Is it time to upgrade your sales reps' outdated smartphones and tablets? The best CRMs offer a variety of desktop and mobile interfaces, so you'll want to give your team the best connectivity possible. In doing so, you can maximize productivity and deliver the tools necessary to close more deals.



Data accessibility costs

Some CRMs make it difficult to export your data. Others offer export functionality, only to output a file that requires significant modification and formatting. Check to see if your current vendor permits (or charges extra for) on-demand data exporting. If so, you'll then want to review the export file and estimate how much labor is necessary to get it into a usable format.

Data import and de-dupe costs

Some CRMs provide in-depth data migration guides and concierge onboarding services. Other software vendors provide minimal documentation or community-only support. Quality of support will definitely impact your team's ability to make a smooth transition.

Early cancellation penalties

Does your current vendor agreement demand an early cancellation penalty? If you prepaid for a full year, can you request a partial refund? Understanding the answers to these questions could represent thousands of dollars to your business.

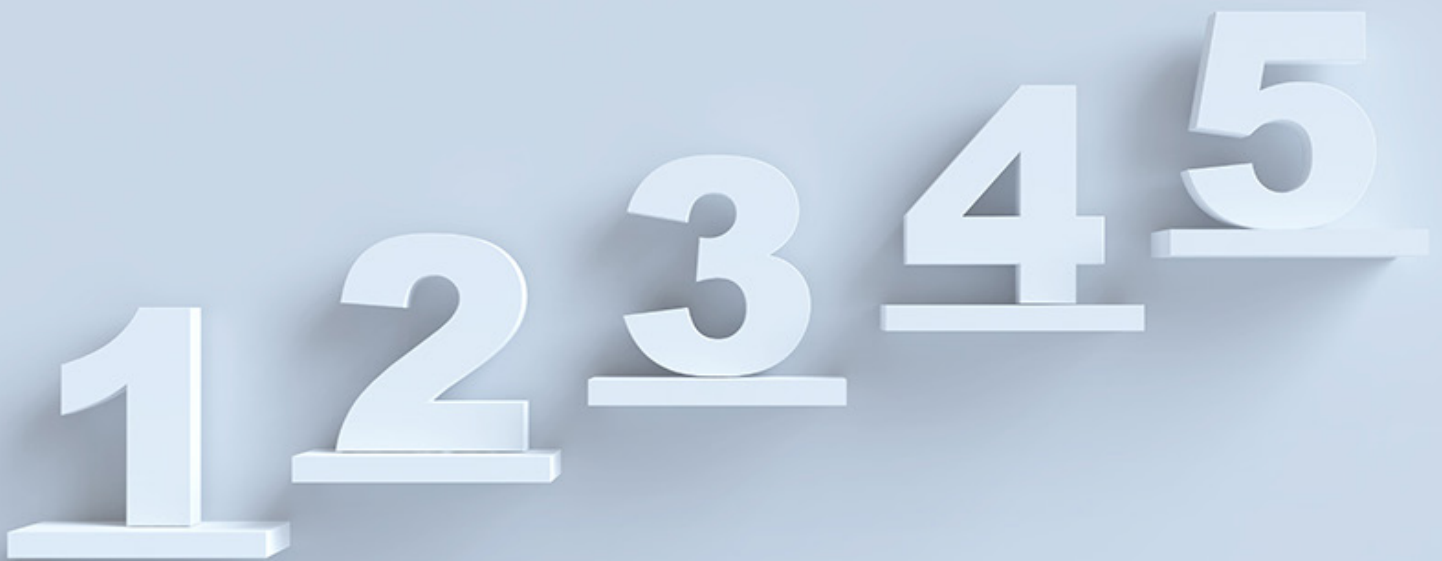
Training and onboarding expenses

This isn't your first rodeo, which means you know what's involved with onboarding a CRM. Who should have access to what? Should you train everyone (once) in person? Or, does it make sense to do a series of several web-based sessions? How much in-house documentation will need to be updated as a result of the switch?

Downtime risks

Even with the best of plans, things can sometimes go wrong (as evidenced by your current CRM situation). If you made a switch, how confident are you that your team could guarantee minimal downtime? Do you need to bring on additional resources to ensure a seamless changeover? Each day spent between CRMs could translate into untold lost opportunities.

Find a better CRM



Understand your needs (first)

If you could wave a magic wand, what would your CRM actually do?

Naturally, you want a CRM that helps you grow your business. That's a given. But how? What specific attributes and features do you need in order to make this goal a reality? What criteria should you consider to make an informed CRM decision? At face value, these can be overwhelming questions to answer on your own.

Fear not, as we've broken the process down into bite-sized chunks.

Step 1: Form a cross-functional team

Selecting a new CRM is the perfect use case for a cross-functional team particularly if you wish to consolidate project management, customer service, marketing, and other operational activities into one system.

Before officially kicking things off, be sure to think strategically about who should be on the team.

There's no magic recipe for the perfect team composition, but answering these questions should set you on the right path:

- **Who are our current/future administrators?**
- **Which departments are currently using our CRM?**
- **Which departments could benefit from being on a unified system for CRM, marketing, and service?**
- **Who from IT should be on this team?**
- **Do we have anyone who has served on a similar team in the past?**
- **Should we include at least two outside-the-box thinkers?**

As you finalize your shortlist of probable members, keep two primary objectives in mind. The first is obvious: selecting a better CRM. The second, however, is subtle: creating ownership. By forming a cross-functional team, you're aiming to create a company-wide sense of advocacy for the new system. Advocacy is a key ingredient in a successful CRM launch. Choose your team wisely!

Step 2: Let people vent

Before a physician can properly diagnose any disease, he or she must first listen to the patient and understand the symptoms. Your legacy CRM may not be a disease, but it sure is impacting the health of your business. Time to listen up!

Put together a plan for soliciting feedback from across the organization. Allowing each manager to speak on behalf of his or her department might be sufficient. For a more data-driven approach, however, the team could design a brief survey and collect input from additional stakeholders:

If you're unsure of where to begin on such a survey, the following common pain points (from a leading industry study of 750+ businesses and business owners seeking CRM efficiency) might get your creative juices flowing:

- **Disorganized information**
- **Poor client and supplier management**
- **Inefficient collaboration with team members**
- **Difficulty managing projects**
- **General lack of productivity**

As you formulate your survey questions, don't just ask users what they dislike about your current CRM. Challenge them to suggest what a more efficient solution might look like.

For example, if you ask a question like this:

"What do you dislike most about our CRM's mobile app?"

Add a follow-up question that asks:

"Ideally, what should the mobile app do?"

Letting people vent is a good place to start. Just remember to also ask for enhancement ideas, too.



Step 3: Analyze and group the feedback

After requesting feedback, it's time to make sense of it all. As you begin to analyze the data, you'll likely notice a few common threads. (You'll probably also notice a bunch of duplicate requests, which should be consolidated.) Such commonalities can be instrumental when grouping the many ideas, issues, and feature requests.

As an example, you may find that most feedback falls into one of the following categories:

- ▶ Important features
- ▶ Cost & licensing
- ▶ Scalability
- ▶ Integrations
- ▶ Support

Categorizing your team's feedback should make it easier to prioritize the musthaves from the nice-to haves—which leads us to the next step.



Switch to **Insightly**, a unified CRM with sales, marketing, service, and project management in one tool.

Step 4: Sequence your “must-haves”

No CRM will solve every one of your problems.

The next best option is to pick a CRM that meets all of your “must-have” requirements and as many nice-to-haves as possible. To pull this off, you need a simple method for organizing and sequencing the feedback from step three.

Companies often use spreadsheets to weigh the many considerations involved with a CRM decision. Others prefer a Kanban-style approach (such as the one below), which can offer more intuitive filtering and prioritization.

The screenshot displays the Insightly CRM interface with a Kanban board for project prioritization. The board is organized into three columns: "Ideas to Sequence 5", "Nice-to-Haves 2", and "Must-Haves 3".

Column	Item	Status
Ideas to Sequence 5	Modern User Interface	Not Started
	Quoting Automation	Not Started
	Social Media Prospecting	Not Started
	Web-to-Lead Integration	Not Started
	Workflow Automation	Not Started
Nice-to-Haves 2	Email Marketing Integration	In Progress
	On-Demand Phone Support	In Progress
Must-Haves 3	\$39 per user or less	In Progress
	50,000+ Record Limit	In Progress
Must-Haves 3	Built-in Project Management	In Progress

The interface includes a sidebar with navigation options: Home, Tasks, Contacts, Organizations, Leads, Opportunities, Projects, Emails, Calendar, and Reports. The top navigation bar features the Insightly logo, a search bar, and a "New Project" button. The bottom of the screen shows a footer with links for Customer Support, Blog, API, Android App, iPhone App, Terms of Service, and Privacy Policy.

Either way, it's wise to present the criteria in a way that can be easily ranked, sorted, and adjusted as you evaluate potential vendors.

Step 5: Evaluate vendors

Having acquired an in-depth understanding of your needs, you're in an excellent position to begin comparing vendors and getting demos.

Although an entirely separate eBook could be written on this topic, vendor selection typically starts by identifying those solutions that fit within your cohort group. If you're a growth-oriented company with 50 or so employees, you wouldn't want to waste your time on systems that only support a handful of users. Likewise, you probably shouldn't consider systems that are actually ERPs (enterprise resource planning systems).

So, how can you quickly identify solutions that truly fit your cohort group? Word-of-mouth referrals and online research are a good start, but SaaS (Software as a Service) vendor peer reviews can be even more beneficial (such as this example from the folks at TrustRadius).

insightly **Insightly** ★★★★☆ 330 reviews

✓ Customer Verified \$ Starting Price \$0



Insightly is an online CRM solution targeted at small and mid-sized businesses. It also provides project management, workflow automation, and reporting capabilities, along with 3rd-party integrations.

▼ Hide Details

Key Features	Reviewer Insights	Recent Pros and Cons
Customer data management/contract management (305) 9.0 ██████████	86% "Would buy again" + 7 more	<div style="border: 1px solid #ccc; padding: 5px;"> <p>+ Provides a platform to organize project information</p> <p>- The information on Mailchimp Integration is very poor and I want to use Mailchimp Marketing</p> </div> <p>Kathryn Arnold Sales Representative Planned Interiors Associates (Arnold Design Resources) (Furniture, 1-10 employees)</p>
Integration with email client (e.g., Outlook or Gmail) (285) 8.7 ██████████	100% "Delivers good value for price" + 7 more	
Task management (293) 8.5 ██████████	87% "Happy with the feature set" + 7 more	








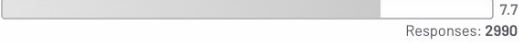

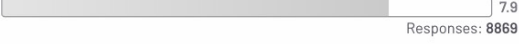




[View all](#)

Remember, the CRM industry is no longer in its infancy. As you narrow your vendor list, drill down and seek comparative reports that aggregate candid feedback from actual users. What are users saying about your "must-have" features? Which vendor seems to check the most boxes?

+ Add Product	 Insightly CRM <small>Optimized for quick response</small> Try for free	 Salesforce Sales Cloud <small>Optimized for quick response</small> Try for free
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At a Glance		
Star Rating	★★★★☆ 728 reviews	★★★★☆ 12,776 reviews
Market Segments	Small-Business (76.8% of reviews)Ⓞ	Mid-Market (46.2% of reviews)Ⓞ
Entry Level Price	\$29/ user, per month (billed annually)	\$25.00 Per Month

Pricing		
	Plus \$29 / user, per month (billed annually)	Sales Essentials Edition \$25.00 Per Month
	Professional \$49 / user, per month (billed annually)	Professional Edition \$75 /user/month*
	Enterprise \$99 / user, per month (billed annually)	Enterprise Edition \$150 /user/month*
	-	Unlimited Edition \$300 /user/month*
	✔ Free Trial	✔ Free Trial

Ratings		
📌 You can now customize and share product comparisons. Click checkbox to select ratings and then click the "Add to My List" button. Collaborate on software purchases like never before!		
Meets Requirements	 8.3 Responses: 624	 8.7 Responses: 10296
Ease of Use	 8.4 Responses: 629	 7.9 Responses: 10340
Ease of Setup	 8.4 Responses: 276	 7.2 Responses: 2963
Ease of Admin	 8.5 Responses: 280	 7.7 Responses: 2990
Quality of Support	 8.0 Responses: 525	 7.9 Responses: 8869
Has the product been a good partner in doing business?	 8.5 Responses: 264	 8.1 Responses: 2923
Product Direction (% positive)	 7.9 Responses: 600	 8.0 Responses: 10006

One final note about the vendor evaluation process: Ideally, each vendor would offer a free trial (or, better yet, a free plan). There's arguably no better way to evaluate software than getting in and using it.

Get your game plan



Great news! Your team believes that it has identified the perfect CRM for your needs.

Now what?

At this point in the process, it's common to feel a bit unsettled. On the one hand, you desperately want to switch to the new system. On the other hand, you know that switching will likely be a monumental project. Is the effort (and opportunity cost) going to be worth it?

Reduce your anxiety by assembling a switching game plan. By answering the following questions, you'll be one step closer to an effective transition.

What is the “best case” timeline?

Start with the end in mind. Nothing would make you happier than being off your legacy CRM when next quarter rolls around. But, is a two or three-month time frame realistic? Engage your team and ask for a firm go-live date that's both specific and ambitious. Otherwise, you may find yourself dealing with a neverending project.

What's the worst that can happen?

Seriously. What's the worst that can happen? If you're feeling particularly negative, you might worry that the new system will be a flop like your old CRM. Or, you may be concerned that your data won't “fit” into the new system. Whatever nightmare you can conjure up, it's worth getting it all on the table. In some strange way, acknowledging your “worst cases” might deliver the extra ounce of confidence you're looking for.



Which factors might cause delays?

Few projects go exactly to plan. A CRM conversion is no exception to that rule. Don't be surprised if one of the following requires your attention during the switching process:

- Pre-existing vendor agreements
- Unexpected export challenges
- Data-mapping questions
- Integration hiccups
- End-user resistance
- Delayed learning curves

During the kickoff meeting, be sure to ask your team for any other difficulties they foresee. As the saying goes, an ounce of prevention is worth a pound of cure.

Who is going to “own” the project?

Accountability by committee isn't a viable option. Sure, you need a crossfunctional team to execute the plan; however, you also need someone who will rally the troops, hold others accountable, and ensure successful delivery. In other words, you need someone who will own the project. This might be your lead IT resource, or perhaps your sales leader would do a good job.

When selecting a project owner, look for someone who is detail-oriented but also understands the bigger picture. Good communication is also key, so identify a team member that excels in this skill.

How will we communicate the change?

Speaking of communication, it's never too early to develop your roll-out plan. Remember, some end users will be hesitant to accept change. Others might be downright resistant (especially if they feel left out of the process). Therefore, the moment the decision is made to switch CRMs, a special “change management task force” should be assembled. The charter of this group is rather simple: ensuring open communication between the transition team and the rest of the company.

In particular, be very clear about the go-live process. Are you anticipating any downtime during the transition? If so, that's definitely something you'll want to be specific about, thereby allowing your staff to plan their work accordingly.

[Get a demo of Insightly](#), the unified and affordable CRM.

What specific steps will occur during the go-live period?

Has your team assembled a step-by-step plan yet? Depending on the data layers and integrations involved, this could vary greatly from company to company. Regardless, you might want to think through these:

- What specific steps need to occur on the day of launch?
- Who will be responsible for each step?
- What happens if a key team member is unavailable. Is there redundancy?
- Should our launch date occur during non-business hours?
- How can we minimize any negative impacts on productivity?
- Do we anticipate any blackout periods?
- How long will we run our old and new systems in parallel?
- When will end users be invited to the system and how can we help them expect that?
- When will end-users be locked out of the legacy CRM?



Does everything actually need to be migrated?

There's a good chance that your legacy CRM has some junk in it. In fact, that maybe part of the reason why it's failing.

Do any of these sound familiar?

- Unused custom fields
- Overlapping tags
- Confusing dropdown menus
- Hacks/workarounds
- Duplicate records

A new CRM is an opportunity to start fresh—and leave the junk behind. Challenge your cross-functional team to identify only those records, fields, and objects that are truly needed. You can always save the extra “junk” in a CSV (in case someone needs it later). Taking a somewhat minimalist approach could offer additional clarity, reduce confusion, and expedite CRM success.

How will we train and onboard users?

Every CRM is different. Although there may be some similarities between systems, your end users are bound to encounter countless differences. These differences inevitably create questions - and, if not answered, can cause confusion. Be proactive and put together a rock-solid training and onboarding plan that includes multiple recorded sessions per user type and ample time for Q&A. If you've picked a good vendor, you may be delighted by their robust support documentation and user community, which definitely helps.

What is our definition of “done”?

Projects of this magnitude can linger on forever unless you set specific acceptance criteria. Your team should be specific when defining “done.”

For example, one definition of done might be as follows: “By March 30, we will be completely migrated to our new CRM. All users will be trained and onboarded, and our old CRM will be cancelled.”

Anything short of your definition, work still remains.



Measure ROI & user adoption

Your CRM transition plan went as planned with a few hiccups. End users are happier, the sales pipeline is cleaner, and, generally speaking, things seem much less chaotic.

Anecdotal evidence suggests that switching CRMs was a wise decision. But, how can you know for sure?

Although there's no one-size-fits-all formula for quantifying return on investment, your company can (and should) seek to measure CRM success.

Here are some tips for estimating ROI:

Pre- and post- implementation surveys

Conduct a survey of all end-users pre- and post-implementation. Ask the same questions on both to measure the delta. Include questions that tie back to the frustrations and inefficiencies you discovered in the early stages of your CRM process. Ask users to rate their perception of speed, collaboration, productivity and ease of use of the old vs. new systems.

This data, plus the KPIs discussed in the next section, will give you a full picture of both qualitative and quantitative change.



Define KPIs (Key Performance Indicators)

A KPI should be more than just a buzzword. Establishing best practice KPIs will help your company monitor progress toward the achievement of its goals.

When it comes to CRM-related KPIs, here are a few popular choices:

Pre-sale metrics

- Lead count by source
- Opportunity count by pipeline
- Lead-to-opportunity conversion rate
- Average projected deal revenue

Post-sale metrics

- Win percentage
- Revenue per sale
- New revenue per day, week, month, etc.
- Order volume per sales representative
- Estimated profitability per won deal

Delivery metrics

- Opportunity-to-project conversion ratio
- Project aging (average number of days or weeks)
- Percentage of past-due projects to total
- Actual cost vs. budget

Productivity metrics

- Task completion count
- Tasks completed per team member
- Task duration
- Top-producing team members

Make your KPIs accessible

Defining a bunch of KPIs offers minimal value without transparent reporting. Your CRM should be able to help with that. Check to see if your CRM offers a library of pre-built reports and dashboards, such as this one from Insightly. Get to know your CRM's reporting interface. You might be surprised by the many ways you can slice and dice the data. For example, with Insightly, you can quickly drag and drop report fields to arrive at this "opportunity count by pipeline" KPI, as discussed above.

This data can then be converted into a chart or exported to CSV format for further analysis.

Automate the review process

KPIs are often ignored unless they're woven into a formal review process. If you already have an operational review process, insights from your CRM should be a nice addition. If your company has no such review process, it's time to take these steps:

- Determine who will “own” each KPI
- Schedule recurring review meetings with key stakeholders
- Discuss who will collect data for each meeting. Assign repeating tasks to ensure this is always completed on time.
- Encourage team leaders to enable CRM subscription reports, pushing real-time data to their inboxes. This will help them stay on top of KPIs and (hopefully) identify potential issues prior to review meetings.

When review meetings occur, don't just go through the motions. Dive into the data and ask tough questions. What is causing certain KPIs to underperform? Is additional benchmark testing necessary?

Continuously tweak and refine

No process is perfect on day one. However, by setting clear goals and tracking KPIs, your team will be in a much better position to make adjustments.

Your KPI data plus your survey data will give you a full picture of the success of your process for switching CRMs. This can create excellent cross-departmental learnings for your organization as a whole.

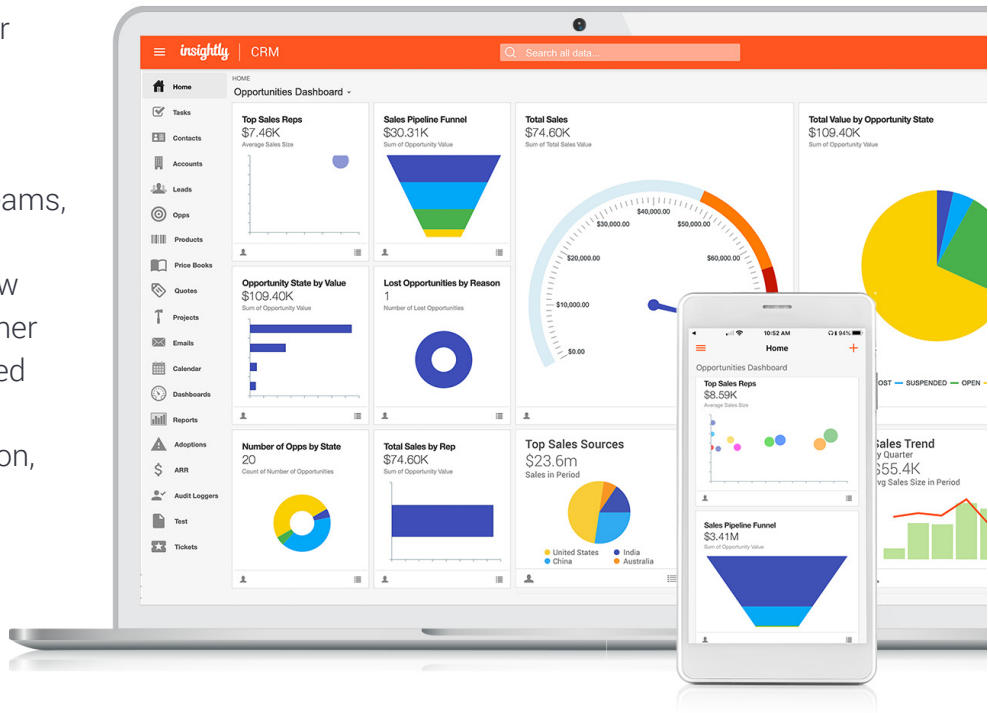


Conclusion

In summary, switching CRMs can be a big project - but one that's well worth the effort. With today's limitless options for CRM technology, "settling" on your current platform just isn't a viable path forward. If change seems inevitable, this eBook should serve as a helpful reference. Feel free to share it with your entire team.

About Insightly

Insightly elevates the customer experience by aligning sales, marketing, and service in one platform. Built to deliver key customer insights across all teams, Insightly's unified CRM helps organizations sell smarter, grow faster, and build lasting customer relationships. Insightly is trusted by more than a million users worldwide. For more information, visit insightly.com.



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