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5. Rent. Don't buy or build 2

6. Build. Don't buy or rent

7. Buy. Don't rent or build

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Do CRM on a shoestring



Ten points to help you when planning implementing CRM on a shoestring

1. First sort out your MRC (not CRM)

That's figuring out how you 'manage your relations with customers' before you leap into action on your CRM system as this [post by Bryan Eisenberg](#) makes clear.

You could do worse than to read his and Jeffrey Eisenberg's book, [Call to Action](#). It's got lots of advice about online marketing that anyone doing CRM on a shoestring will find a great asset.

Also read [Seth Godin](#) and [David Meerman Scott](#) to keep your ideas fresh and up-to-the-minute...

2. Knuckle down on business benefits

Your business benefits need to drive your requirements. Make sure you've thought through exactly what benefits your business/organisation wants to achieve. Once you've got clear sight of the exact benefits you want, you need to prioritise them in terms of importance to your organisation.

The next step is to define how you'll measure it. Defining metrics for your business benefits might put fear into you, but it needn't. Keep it simple, make sure it's something that you can achieve easily, if it's too complex or prosaic, you won't get around to doing it. You only need a few measures to keep tabs on progress. Measurement of the strategic impact of your activity is important so that you can know if it's paid off or, that you need to pay heed to why it hasn't worked and if you can rescue it or you have to cull that area of investment because it's not going to deliver.

With your benefits and metrics defined, you now have a strategic framework to keep your requirements on the straight and narrow. An IT investment without a strategic framework is going to hell in a handcart. You need a clear focus to navigate through the numerous choices you have to make. Choices not only about what your organisation wants your 'CRM solution' to do, but also about what the CRM software products/options can offer (lots of scope for distraction from what you really want to achieve!).

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3. Keep requirements realistic

It's all too easy to get carried away dreaming up your perfect solution. Keep it practical and focused on where the most pain is. Bring everyone who touches your customer data, who'll be using the system, into the process. Share with them the prioritised business benefits to help give them the full picture about where the effort is going to be put and why.

Do mini interviews with people at their desks to understand exactly what they're doing and how it needs to evolve. Understand how customer data flows into organisation and what happens to it during its lifecycle. Write these details and requirements up. Circulate them and get people together to discuss. Explore the impact the changes will have and what can be done to improve things without reliance on software or complicated systems or data integration. You might be pleasantly surprised what can be achieved using good communications, changing existing processes, a bit of spreadsheet manipulation and some manual moving of data around on a regular, planned basis.

Have a look at the CRM consultant to help you more:

www.mareeba.co.uk/blog.

4. Talk to your peers

You are rarely alone in the problem you are facing. The best resource you have is to speak to your peers about how they solve it. This will help you understand pitfalls, open your eyes to the options and give you perspective on many aspects such as budget, duration, training needs etc.

5. Rent. Don't buy or build

There are lots of great software as a service (SaaS) solutions out there. It's an easy way to get organized quickly and it may just be all the solution you need. It depends where your pain lies as to what solution is most appropriate but do take the time to look at the options available, get demos, try them out and assess how well they meet your needs or not.

<http://www.reallysimplesystems.com>

<http://highrisehq.com/>

<http://www.marketcircle.com/daylite/>

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<http://www.zoho.com>

<http://www.sugarcrm.com/crm/>

<http://www.salesforce.com/uk/>

<https://uk.sagecrm.com/>

6. Build. Don't rent or buy

If you're close to, or can get close to people who can develop solutions based on low-cost technologies then it's a great route to create your own solution. It might be Microsoft Access or Filemaker, or MYSQL (with relevant programming language). If you have a little bit of expertise you can do a great deal, and typically you can find help cheap and easily to update or support your solution.

You might be surprised to discover that others are doing much the same, after all if it's cheap, effective and easy, then why throw more money at the problem or over-complicate things by replacing something perfectly workable with expensive and difficult to change products that you rent or buy.

7. Buy. Don't rent or build

Products are great if you make the most of them and can be sure they're going to deliver on their promise. You may also find that an associated product has the CRM capabilities.

<http://www.frontrange.com/goldmine.aspx>

<http://www.act.com/>

<http://crm.dynamics.com/>

8. It's people that make it work

Whatever you do it's important to get momentum behind it. What people do will dictate whether it is a success or not. Make sure you pay close attention to training and developing clear protocols. Make your system easy to follow, provide prompts to help remember what to do and tell people why it's important. If your people are on board then you'll reap dividends far beyond what technology alone can provide.

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9. Be agile

These days you'll probably come across the fact that your software will be written or implemented in an 'agile' way. It's worth browsing the '[agile manifesto](#)' that kicked it all off.

Agile is trust-based, which means you have to make sure that you are taking delivery of 'working software frequently' to ensure it's working for you. It's great, evidenced by the fact that the alternative 'waterfall' project methodology has become passé and that, well, everyone will tell you it's how they'll approach your project these days. All in all, remember the well-worn saying about how to eat an elephant... one bite at a time. [This and other sage advice about agile](#), from Kelly Waters.

10. Stay close

No matter what you spend, or what tools you have at your disposal, you need to stay close to it. With the right backing and attention your project will flourish and deliver on what you set out to achieve. Take your eye off the ball or let your attentions wane, and you might just have a dud on your hands and you're in the same boat as those who spent far more money to end up with the same result.