How to Choose Cloud Software

salesforce small business

Introduction

For any business, settling on cloud software can feel overwhelming. There are so many vendors to choose from, terms to learn, and pricing structures to navigate.

But it doesn't have to be that way.

Companies large and small are running all kinds of software applications in the cloud, including customer relationship management (CRM), customer support, and marketing automation.

We recently talked to other small business leaders who have not only successfully navigated the cloud software-buying process, but also regularly helped other companies do the same.

With that in mind, this e-book is designed so you can learn from them and get valuable advice on everything from what questions to ask cloud vendors, to how to understand "cloudspeak."

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Get to Know the Cloud

Before we take a deep dive into the world of cloud software, let's get the most basic, yet most important, question out of the way:

How will the cloud help my business grow?

Cloud solutions free up your team to do what they do best: sell, service, and market to customers. But don't take our word for it. We recently chatted with a few small business leaders who used these three words to describe cloud technology: *simple, optimized, and transforming*.

Simple

The cloud allows you (or anyone in your organization) to access your most important business information from any web browser or mobile device, at any time. That means no more buying servers, patching together various systems to get information, and running multiple reports to answer simple questions.
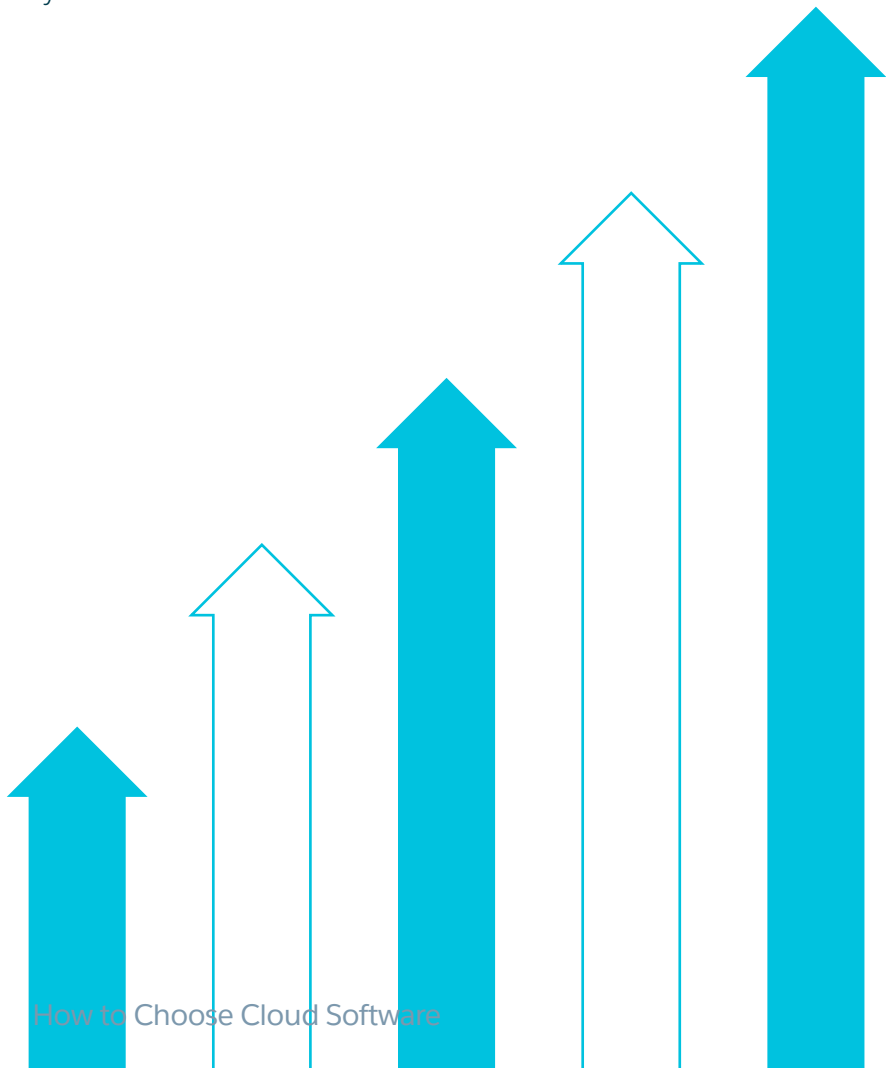
Growth Expert Hot Topic #10:
How Do You Justify the Cost of CRM?

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Optimized

Once you move to the cloud, you can build your entire business on one platform, simplifying and accelerating sales, marketing, service and support so you can be laser-focused on one goal: growing your business.

"The largest benefit to cloud-based CRM (customer relationship management) is its ability to simplify the job of a salesperson by transforming data into customer insights, and making it available anywhere, anytime, on any platform."

Aaron Zuccolin
General Manager, Torq Systems,
a cloud consulting firm

Transformative

And finally, cloud software eases data entry, ensures quality of data, automates tasks, and keeps users informed so they can stay ahead of the game.
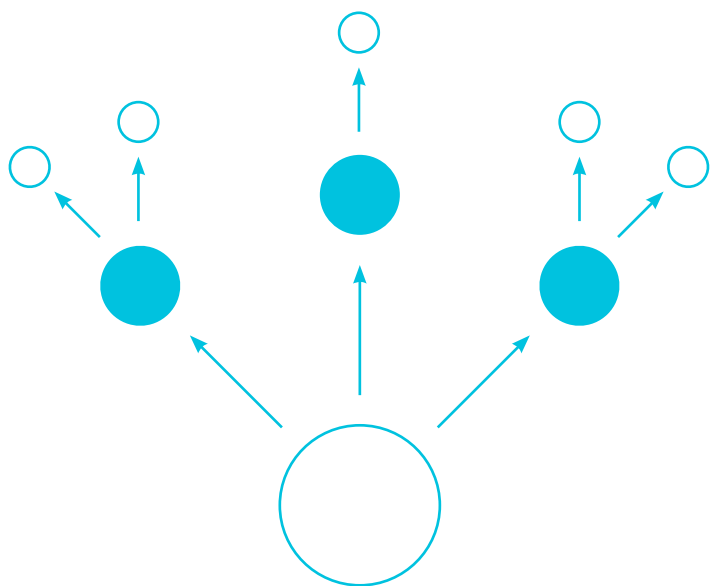
These are a few cloud software benefits, straight from the small business owner. In the next chapter, we'll take an even deeper look.

"Rather than needing to focus on the systems that you use to run your business, you are able to focus more on running your actual business. Ultimately, you are able to track, manage, and analyze the data stored in a CRM, for example, to then take actions to better serve your customers, and further the success of your business financially."

Ammon Cunningham
VP, Simplus,

a Salesforce consulting and development firm

Understand the Benefits

If affordability and running your business from anywhere sound like awesome benefits, that's because they are. Actually, there are so many great reasons small businesses are making the jump to the cloud.

On the next page, we'll name a few:

We'll name a few:

Cloud software is easy to manage.

Traditional on-premise business apps are expensive; they require a data center, power, servers, storage, and a team of experts. It's almost too much for a large company to manage, much less a small business. With cloud software, your cloud vendor takes care of all this.

You won't lose information.

If an employee leaves your business, or a computer is damaged, you won't lose your valuable customer information. It's stored in the cloud and accessible wherever you can get an Internet connection.

There are affordable options.

Because you don't have to spend money to install, maintain, and upgrade hardware, cloud software is a much more affordable option than on-premise solutions. Plus, certain cloud software vendors offer predictable subscription options, so you can pay as you go.

Implementation is fast.

Cloud-based software can be up and running in hours, which is unheard of with traditional business software. All you need to do is login, customize your app, and start using it.

Information stays up-to-date.

With cloud software, when you update information, it's updated everywhere. This means that no matter where your team is working that day, they will always have access to the most recent customer and business data.

Cloud software grows with you.

With cloud software, upgrades are automatic so you always have the latest innovation. Plus, they are flexible enough to be scaled up to tens of thousand of users, or down to only a few. Every business, no matter its size, can get the same benefits.

So, now you have an idea of the benefits of cloud software. What else should you keep in mind?

Things to Consider

Making the leap to something new and different can be daunting (and exciting!). There's a ton of information to absorb and a lot of research to parse through. So before you start shopping around for the right cloud solution, make sure you have defined your own business goals and what you want to get out it.

Specifically, you want to define your unique business requirements to ensure you will get a good return on your investment, no matter which cloud software you choose.
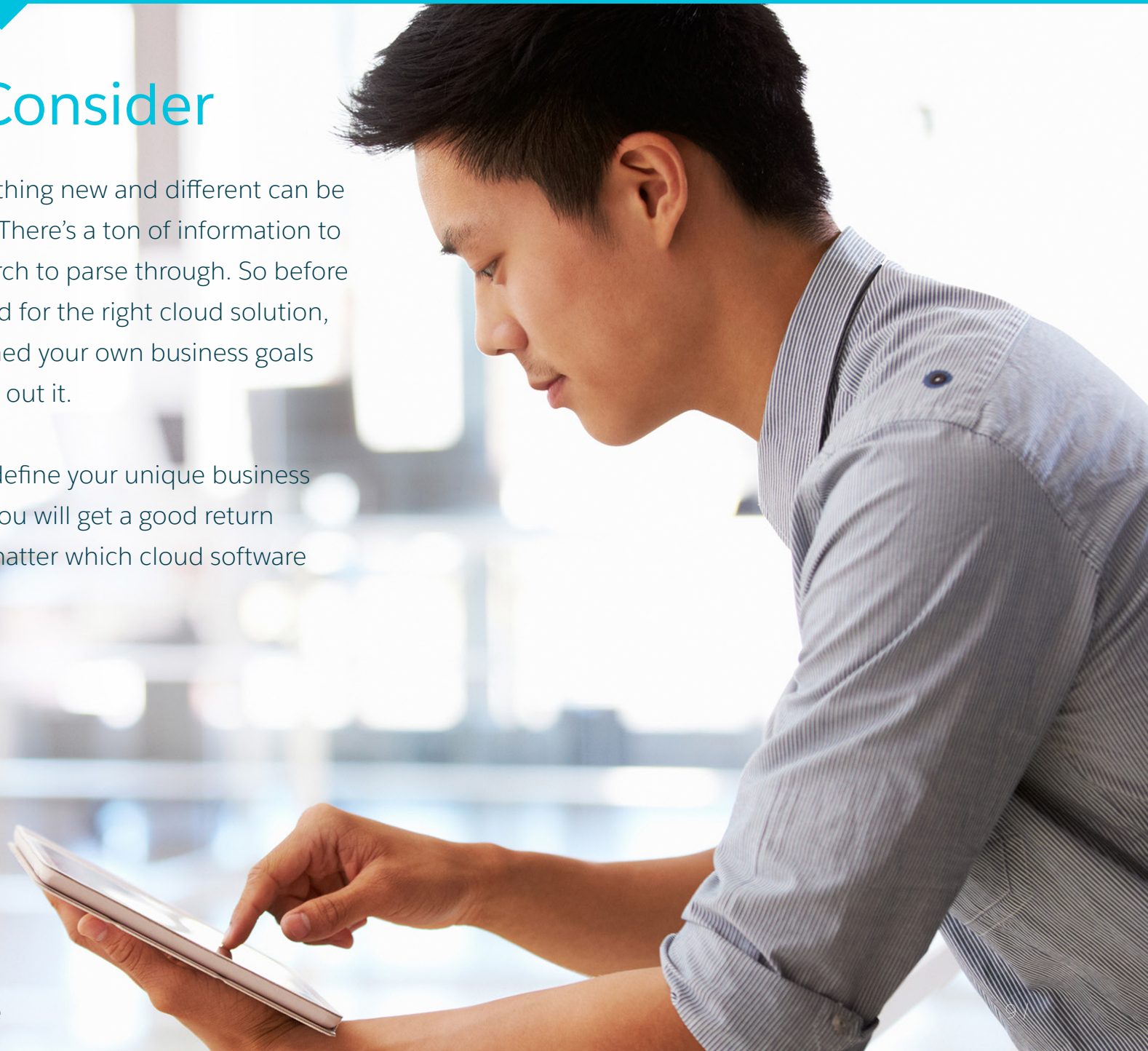
A few things you should consider when evaluating cloud software:

User Experience

A good user experience is key. Find a solution you can fit to the needs of your employees and that offers the social and mobile tools they already use every day.

Budget

Determine your budget for cloud software, then search for specific pricing options for small businesses so it's financially viable. Consider what is the right fit at the right time. If you're growing fast, you may want to choose a solution you can scale into.

Return On Investment (ROI)

What efficiencies will be gained? How will this technology change onboarding costs? Will the automation options decrease the sale cycle or increase customer engagement? What key performance indicators (KPIs) will you use to measure success?

Adoption

Is the software you're looking at easy to learn and intuitive? Get everyone on board from the beginning, and choose a vendor that's prepared to support you through the adoption process.

Scalability

There are many software packages that focus on the small business market specifically. But if you're growing quickly, or plan to, you need a cloud vendor that can support your growth.

Having to start over with a new software package once you hit a certain level of growth could create unnecessary obstacles that slow you down rather than accelerate your progress. Make sure you choose a vendor that can scale with you so growth is a blessing, not a curse.

Once you've determined all of the above, start doing some research on which vendors are able to satisfy your needs.

Then create a list of smart questions to ask.

Questions to Ask

Now you're ready to invest in cloud software. But how do you decide which solution is best for your small business?

With the help of other businesses that have faced this same dilemma, we've come up with a solid list of questions every entrepreneur should ask cloud vendors before making any purchases:
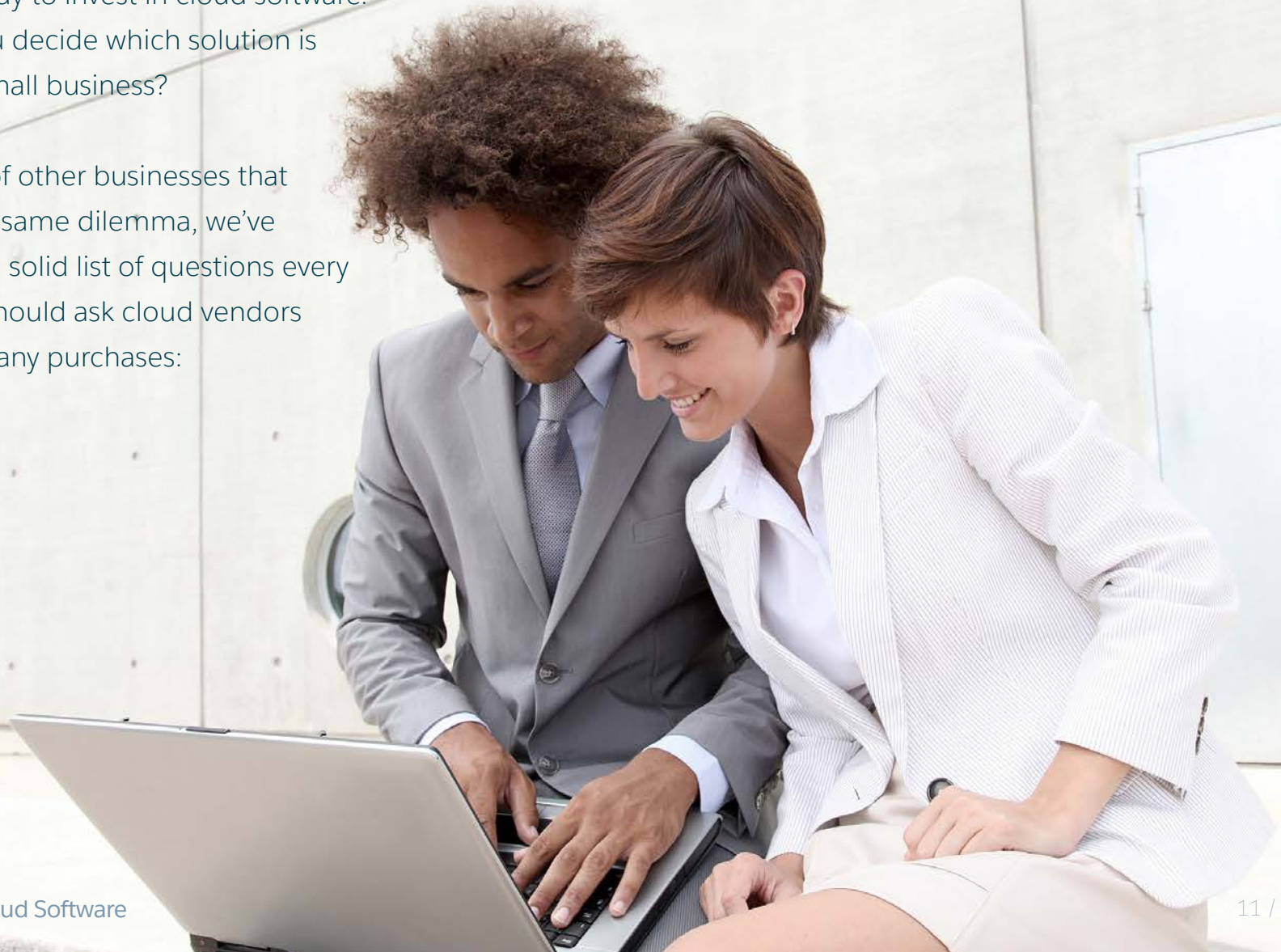
1. How has your solution helped other small businesses?

Ask for examples and to speak to some of those other customers. If their product has a track record of adding value, they'll be more than happy to share.

2. What is your online service and customer support like?

Because cloud outages can be disruptive and costly for your business, it's best to choose a provider with as few outages as possible. The best vendors post their downtime history logs online. Also, they typically have service-level agreements (SLAs) for their support teams, which commits them to responding quickly and resolving any issues.

3. What is your pricing structure?

Get the details (in writing) on how their fees work. The ideal pricing scheme should be pay-as-you go from the outset, with the ability to add services as needed. Fees can typically be charged hourly, monthly, semi-annually or annually, depending on the vendor.

4. How long will setup take?

The easier it is to configure and integrate, the faster the setup – and the quicker you'll see a good return on your investment.

5. How do upgrades work?

Is this a company that's keeping pace with the times? Is it a leader in the space, or a follower? You want to ensure that you're selecting a cloud company that has a proven track record of innovation. They should be able to show you examples of this.

6. What features are included and can they be customized?

Make sure that the cloud software you're evaluating lines up with the business requirements you listed earlier.

7. What are my options if my business outgrows what I'm purchasing today?

The ideal cloud software solution will grow along with your business. See what it will take to scale up, whether you add 10, 100, or 1,000 employees.

"Cloudspeak" Defined

You don't need to know much "cloudspeak" to move to the cloud. According to Donal de Paor, CEO of Veltig, small businesses need to know "very little" about the cloud in order to use it. "The beauty of the cloud is that your security, networking, and hardware needs are all managed for you – small businesses outsource all these challenges to the cloud vendor," he says.

It's more important that you know and understand your key businesses processes, your goals, and the metrics you need to grow than it is to know the language of cloud technology. "Partner with people who want to understand your business so they can translate your needs into the technology. Technology and "cloudspeak" should never restrict or define the business's CRM requirements," adds Aaron Zuccolin, General Manager, Torq Systems.

But, in case you're still curious, here are some commonly used words and terms used in the world of cloud software, plus their definitions:

Cloud: The computers and connections that support cloud computing.

Cloud Computing: The practice of storing regularly used computer data on multiple servers that can be accessed through the Internet.

CRM: Stands for Customer Relationship Management. At its simplest, a CRM system allows businesses to manage business relationships and the data and information associated with them.

Customer support software: This software lets you manage customer inquiries so you can offer fast, accurate help and easily measure your support and company performance.

Hardware: The physical components of a computer, such as a screen or a keyboard.

Marketing Automation: Marketing automation works to automate your marketing communication programs. With this platform in place, your marketing and sales teams can automate and optimize your lead generation and nurturing programs from start to finish.

Multitenant: Multitenancy is kind of like an apartment building. Residents get the benefits of sharing the main framework, but still have the privacy they want, thanks to walls and doors.

On-Premise: This is the opposite of cloud software. It's software that runs on computers on the premises (typically your office building).

SaaS: Stands for Software as a Service and is defined as group of applications that are hosted by a vendor or service provider that customers can access via the Internet or some other network.

Software: Computer data that can be stored electronically.

Conclusion

Cloud solutions can do wonders, especially if you're looking to grow your business. They can make you and your employees more productive, manage important information, and help you build better customer relationships.

We know that when it comes to actually making a purchase, you need to feel good about that decision – regardless of which vendor you choose. We hope this e-book helped simplify the process, from start to finish, and that you are well on your way to choosing the cloud software that's right for you.

Resources You May Also Like:

YOUR COMPLETE CRM HANDBOOK

EVERYTHING YOU NEED TO KNOW TO GET STARTED WITH CRM

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