

How to Decide Which CRM Solution is Right For You



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Hello.

You've just opened one of four books in a series on CRM systems from the #1 CRM solution in the world, Salesforce. 100% cloud, social, and mobile, Salesforce has led the revolution in sales, service, and marketing by helping companies of all sizes connect employees, partners, and customers like never before.

Here's a full list of titles in this series designed to help you get started with a CRM solution that's right for you.

- How a CRM Solution Helps Your Business Grow
- How Social CRM Connects You to Customers
- How CRM Helps Small Businesses
- How to Decide Which CRM Solution is Right For You

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From 2010 to 2012, CRM cloud application use grew from 34% to 55%.

- Gartner Inc., Market Share Snapshot: CRM Software, 2011

It's Time for a CRM Solution

Congratulations. Your business is growing and you've decided the time is right to add a customer relationship management (CRM) system to the mix.

Implementing a CRM solution to manage customer relationships, as well as the data and information associated with them, is a big step, but also a step in the right direction.

So, how do you know which kind of CRM solution is right for your business?

In this e-book, we will explain the two basic types of CRM, dish up some food for thought when it comes to the pros and cons of both, and finally, give you a handy little worksheet to help you sort it all out.

Turn the page for a look at your CRM options.

The Two Kinds of CRM

When it comes to CRM systems, businesses typically have two main options to pick from: on-premise and on-demand, also known as cloud-based.

Here is a quick breakdown of both:

On-Premise CRM

An on-premise CRM is exactly what it sounds like: It's a CRM system housed at the place of business that uses it. This can mean the CRM is kept in a dedicated server room, or even in a closet. Generally, an on-premise solution requires the business to buy either a server or a computer that can act as a server. Once this takes place, the CRM software can be installed on that server, usually by an in-house IT department.

Cloud-Based CRM

A cloud-based CRM system is managed digitally via the Internet by an offsite team of experts. This solution is also referred to as software as a service (SaaS), because it does not require a software installation or an IT department for management purposes. Instead, you simply log in online and begin using it. Cloud-based CRM is accessible anytime by anyone approved within the business to use it — even on mobile devices.

Now let's consider the pros and cons of both CRM options.

The CRM Pros & Cons

The positives and negatives around both on-premise and cloud-based CRM solutions vary. Consider this simple breakdown:

On-Premise Pros

- In-house IT teams have greater control over equipment, security, and data.
- It may be all smaller businesses need for the time being.
- They are easily customisable.

On-Premise Cons

- Outages can cause major delays in using the system.
- If using as a customer service touchpoint, outages can be especially damaging.
- Can mean extra expense if IT expertise must be hired for setup and maintenance.
- Difficult to scale and upgrades can be costly.

Cloud-Based Pros

- Accessible 24/7 by anyone approved within the organisation.
- Accessible on the road via mobile devices
- Minimum investment needed.
- Do not require server maintenance and upgrades are often automatic.
- Scalable and secure to keep up with business growth.

Cloud-Based Cons

- Cloud based systems rely on your Internet connection. If your Internet service goes down you may experience downtime.

Next up is a look at why so many businesses are choosing cloud-based CRMs.

Businesses are embracing the cloud:

40%

of all CRM software sold worldwide in 2012 was SaaS-based.

(Gartner, Customer Relationship Management Software, Worldwide, 2012)

The Move to the Cloud

Many businesses find cloud-based systems to be an ideal choice because they are more affordable when comparing equipment, installation, and maintenance costs.

Cloud-based CRMs also do not place limitations on the availability of critical business information. And with more businesses operating in more than one location, cloud solutions offer key players access to information from anywhere.

Even for businesses with an in-house IT team, a cloud-based platform may be a better choice because it allows the team to focus on innovation for the business, rather than maintaining an on-premise system. Cloud-based systems also integrate well with existing business software and workflow.

Take the quiz on the next page to see which CRM solution is right for your business.

The Best CRM for You

Read the questions below and answer with a simple yes or no:

1. Do you have teams that work closely together even when they're not physically together? Yes No
2. Do you rely on sales teams that are often on the road? Yes No
3. Is your business growing quickly? Yes No
4. Do you need a better customer service experience? Yes No
5. Is your IT department responding to a lot of maintenance requests? Yes No

If you responded yes to at least three of the five questions above, chances are your business will benefit the most from implementing a cloud-based CRM solution, rather than an on-site system.



SALES SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

If you want to grow your sales and establish a transparent sales process, you need an easy-to-use Customer Relationship Management system. Salesforce allows you to store customer and prospect contact information, accounts, leads, and sales opportunities in one central location.

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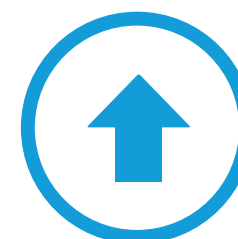
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win rate



36%
increased sales
productivity



28%
increase
in sales



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