Deploying & Maintaining Affordable In House CRM Software

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In this white paper, we will explore the solutions to a common corporate dilemma - maintaining an in-house small business CRM software system, for reasons of data security and customizability - while keeping your on-premise small business CRM project under budget. What are the different options available and how do they all stack up in terms of functionality and price? How does an on-premise software based small business CRM software solution differ from a more affordable on demand hosted CRM software deployment? What is the best solution for my small business? All these questions and more will be answered in this white paper.

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1.0 Introduction

How can you effectively store corporate data in a place that's easily accessible from all departments in your small business? This is a question which many small businesses ask themselves every year, with

another variable in the back of their mind: budget. Multinational enterprises store hundreds of thousands of unique records every month, which are input from a variety of geographic locations, using a variety of front-end systems. All this data has to go somewhere - the trick is making sure its someplace that everyone who might need to access it, can.

Your regional office in mainland China may have its own local intranet to store customer records on, but what happens if your European office needs access to it? Paper files once again become a reality as emails, faxes and telephone calls are exchanged, couriers are paid and valuable time is wasted. In today's world, customers expect you to have the information they need, when they request it. On demand is not simply a catch phrase; it's a reality to any small business who wants to be successful in today's marketplace. So, what can you do? Where can you go? And most importantly, how much will it really cost you?

2.0 Requirements

Finding out what your real small business CRM requirements are, versus imagined ones is sometimes a tricky process. In order to get the real requirements for your small business CRM implementation, you're going to need to take a look at many existing small business processes in every department of your small business, as well as have a forward-thinking outlook on what you're trying to accomplish years down the road from now with the data that you're centralizing. If you're operating multiple offices, think about the geographic spread you're trying to gap and infrastructure present at all your locations. Technology and IT Personnel requirements are typically steep for a multi-office implementation. Other requirements that you will want to have defined before your vendor selection process include:

- What existing front-end systems each department is using

- How many of these systems needs to be able to integrate with one another (i.e.: your Shipping system integrating with your Customer Service Contact Center system)

- Which departments will need access to a new front-end system versus which ones will be replaced with the new small business CRM initiative

- How many concurrent users will be accessing the system, and from how many different locations

- Staffing requirements at each site to maintain the necessary infrastructure (if applicable)

- Training, support, customization, consulting and any other additional charges over and above the vendor's licensing arrangement

Once you have the answers to these key questions, and any other small business specific ones you've already outlined, the next step to take would be in defining what type of small business CRM software solution best suits your scenario and solves all your business process needs. Sometimes this process is

easier said than done, as the small business CRM space can be rather saturated depending on what your needs are. Keep in mind that there are various avenues with which to research and pursue - is it best to go with a large, highly customizable and integratable high-end small business CRM software system? Or are you more in tune with a small-scale deployment? Do you need something that's industry specific, or generic? What are your budgetary restraints? All these questions and more will help you select a proper vendor in overcoming your small business CRM Dilemma.

3.0 The Small Business CRM Dilemma

Currently juggling multiple existing legacy data warehousing systems that are supporting dozens of front-end systems, you're tasked with migrating all of your existing data to a central repository, and consolidating the front-end systems as much as possible to work through this central repository. What's better, you have a budget of under $100,000. The obvious and easiest way out of this scenario is by switching to an On Demand hosted CRM software (Customer Relationship Management) / web-based SFA (Sales Force Automation) / Enterprise Resource Planning (ERP Software) to centrally house all your data at a low cost.

Simply migrate all affected employees over to the new system as applicable, or setup integration points where the legacy front-end systems will communicate properly with the on demand hosted CRM software solution. This minimizes upfront costs and allows you to get your entire organization on the same page, even if it's just as a stop-gap measure. But corporate regulations dictate that you're unable to store customer data on a third party server, due to its sensitive nature. It fits the rest of your criteria - low cost, reliable, infinitely scalable, easily accessible, and able to integrate with just about any third party front-end system, but the directive issued from management dictates that customer data may only be stored on internal systems. This can occur for many reasons - typically it is either due to industry-specific norms (financial industry and insurance industry, for example, have much stricter regulations on data security than most others) or possibly due to local by-laws or statutes. Typically, if the reason is industry-specific, then your small business likely already has a team of data security experts on hand to assist you in your vendor selection process. This can be an invaluable resource in assisting you to find the right small business CRM software solution that meets all the data security requirements laid out for you. Once you have identified the primary challenges necessary in overcoming your small business CRM implementation, it is time to move on to vendor selection.

4.0 Vendor Selection

Choosing a proper vendor is perhaps the most important part of the small business CRM initiative. You need a vendor whose product isn't solely going to provide a 'band aid' for the situation - you need something that's scalable for the foreseeable future in terms of small business growth. Make sure you're very forward thinking in terms of needs requirements, and don't let a small business CRM vendor sell you on something that you're not completely sure of. Once this has been established, there are many vendors from whom to choose from. Below are a few:

- **Siebel Systems / PeopleSoft / Oracle / SAP -** These four have been industry leaders in software based business CRM for some time. They offer a very competitive product, and with the recent releases from all vendors, they have a robust product offering which can integrate with most other software solutions. However, be aware that the price tag for a Siebel implementation can be quite hefty. A Gartner Group report has suggested that the Total Cost of Ownership (TCO) for a Siebel Systems software based implementation for 150 concurrent users can reach over 1.5 million US dollars. This type of price tag is rather expensive, but for the right company, can make a great fit. The other three vendors are on par with the same price ranges.

- **Maximizer / ACT! /Goldmine -** These are the three major small business CRM software providers. Most of these products lack important functionality, and aren't scalable to a larger enterprise. However, it does have a better price tag associated with it than typical enterprise based small business CRM software systems. Watch out for customization and consultant fees, as well. These are fine solutions for a smaller company, but leave very little room for continued growth.

- **Salesboom Small business CRM Appliance -** Salesboom's Small business CRM Appliance is a great multi-use small business CRM server. Bundling the Salesboom small business CRM software system onto a fully loaded and ready to use out-of-the-box server, the Salesboom small business CRM software system can be used on local intranet's as well as deployed via a corporate web site login portal. The Salesboom Small business CRM Appliance is infinitely customizable, and offers a complete ownership price tag of about $10,000 USD for 100 users. Far below industry average for comparable enterprise based systems, and even cheaper than the smaller software based systems such as Goldmine, the Salesboom Small business CRM Appliance makes perfect sense for the small business with a budget, as well as the full-size multi-national enterprise who is looking for something with less up front risk of capital than a traditional enterprise based small business CRM installation.

5.0 Other Factors

There are a few other factors in which to keep in mind. Note that the price that your vendor quotes you is not the actual Total Cost of Ownership (TCO). The price quoted is simply for the software licenses, or in the case of the Salesboom small business CRM Appliance, the software licenses plus hardware necessary to run them. This will not include prices for training, support, future upgrades, IT personnel, customizations or consultant staff provided by, or recommended by, the software provider. These typically 'invisible' costs are ones which you will need to take into account when calculating your small business CRM budget, as they aren't discussed in depth by most small business CRM software providers until after you've committed to buying the licenses.

Scalability is also a big issue. Nobody wants to spend $10,000 or more dollars on a small business CRM software system which is only going to last the company a year before needing to purchase more licenses, upgrade infrastructure, or switch to a different version of the software. Make sure that your

small business CRM software system is going to work for you well into the future, so that you don't have to come back to the drawing board again in twelve months looking for another solution to a problem that should have been solved the first time around.

Lastly, always remember that small business CRM is 90% corporate initiative, 10% technology. Make sure that everyone in your small business is on board before launching a CRM project. CRM is more about increasing customer retention and better managing your customer relationships through improved customer service than it is analytics and efficiency through technology. While all play their roles in helping to make your company more streamlined and efficient, make sure that improving your customer relationships is a priority goal for everyone - from the CEO, through the board of directors, and down to the front line Customer Service Representative answer the phones for you.

6.0 Conclusions

Implementing a software based small business CRM project can be costly, and time-consuming. Doing all of your research before hand on your own individual needs as well as vendor issues will definitely benefit your small business in the long run and help prevent wasted time and capital. The type of solution which best suites your small business will largely depend on the objectives of your small business CRM project - for a large scale project without a limited budget, a good hard look at an offering from Siebel Systems or SAP may be worth its while. But the Salesboom small business CRM Appliance offers a fully robust small business CRM software system, with limitless customization and integration potential, for a very affordable price. It can be easily used in conjunction with the Salesboom on demand hosted CRM service as well, for help in managing offices abroad. And best of all, the price tag, starting at under $10,000 US Dollars, is manageable even for the smallest of businesses.

In the end, however, it will largely depend on your own needs and research to determine which vendor is best suited for your small business. Don't get discouraged - a proper small business CRM implementation for a small business of your size can take months, even years to put together and fully implement. But keep on task, and put each vendor through the paces - once your small business CRM software system is up and running and you're seeing positive Return on Investment (ROI) in the triple digits, you'll know your time and effort wasn't in vain.

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For more information regarding our products and services please visit our site at:

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