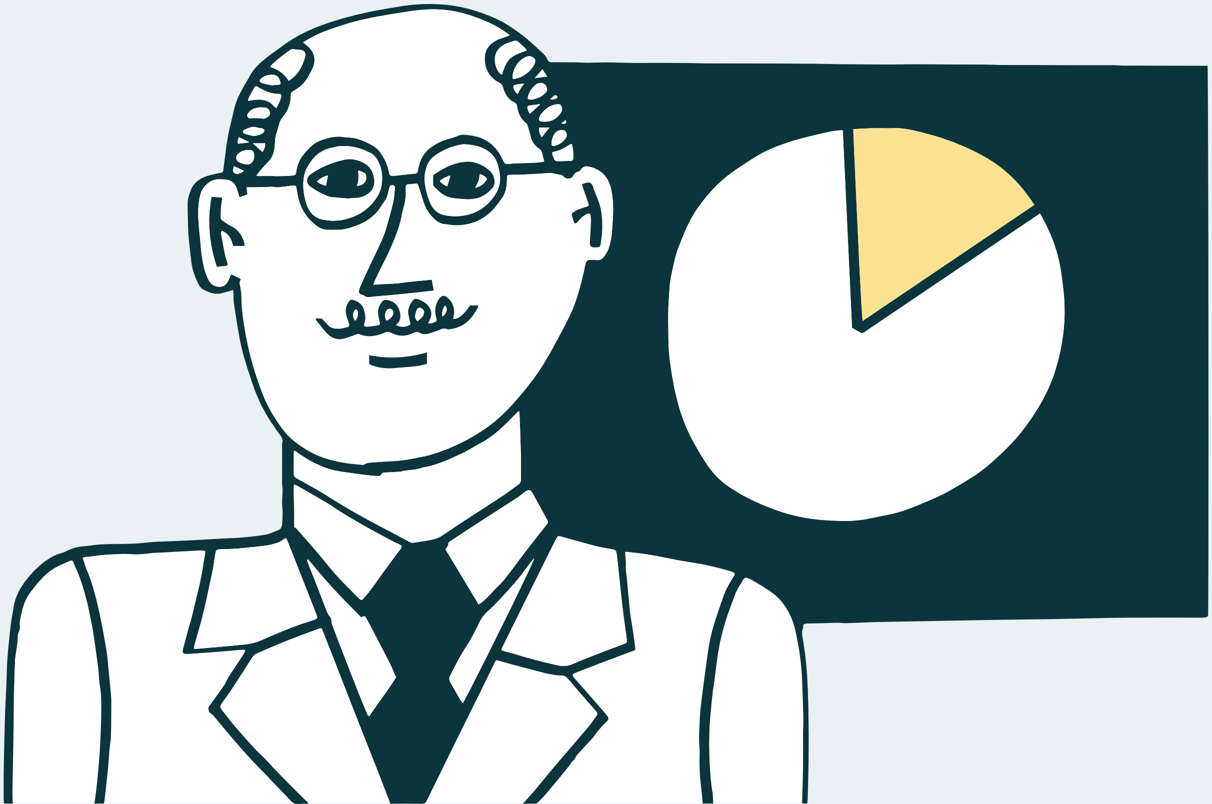
7 questions to ask when evaluating sales software

With hundreds of sales CRMs and solutions on the market, what's the most effective way to evaluate your options, and how do you know if you're making the right decision for your business? Here are 7 critical questions to ask that will help you avoid unpleasant surprises and narrow down the playing field.



Question #1

What's the average adoption rate among customers?

Low adoption rates among a vendor's customer base indicate a major issue with usability, as the value sales software provides should far outweigh the effort it takes to use it. Search for a solution that is highly intuitive and requires little effort from reps to start experiencing the benefits. Features and functionality like automatic data capture, drag-and-drop UIs and email integration facilitate rather than hinder the sales process, inherently driving adoption by allowing reps to focus on closing rather than sorting through tables.

13%

of sales reps say they harness the full capacity of their sales tools

Source: Accenture

Question #2

What does the training and implementation process look like?

When a consultant is paid by the hour to implement your sales solution, it's to his or her benefit for the process to drag for weeks, months or even years. Rather than paying for third-party assistance, some companies hire a dedicated resource to oversee implementation and training. However, the most cost-effective and time-efficient solution is to select a vendor that provides consultative, in-house implementation services, and can work with your team to define a sales process and pipeline that works for your business.

Question #3

How many supporting tools will my team need to use each day?

59%

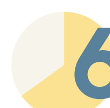
of sales reps believe they are required to use too many sales tools

Source: Accenture

Today's market is flooded with point solutions that seek to solve small pieces of the sales performance puzzle, from email tracking to call dialing and reporting. The more tools your team must use on a daily basis, the harder it will be to improve performance. In addition to hurting adoption rates, this limits visibility by scattering data across multiple platforms. Not to mention, these point solutions don't come for free! Look for a solution that provides calendar integrations, real-time notifications and other necessary tools in a single platform.

Question #4

Are there any limitations across mobile devices?



65%

of professionals think they could be more productive if they had mobile access to work applications like CRMs

Source: Evolve IP

In an effort to avoid being left behind, many legacy sales CRMs launch mobile applications that are essentially read-only versions of their desktop UIs, leaving field reps squinting at tiny numbers and scrolling through lengthy tables on their smartphones. Any sales software worth its salt will have a native mobile experience that gives reps the same capabilities and insights that they get from their desktops, optimized for their tablets and smartphones.

Question #5

Will I get data, or will I get insights?

Because legacy sales tools were not built for the big data era, they collect only basic information and typically provide list-like reports that will tell you what is happening, but not why. What's more, many terms of service agreements indicate vendors' rights to sell and use this data. In contrast, next-generation sales platforms were built to securely and automatically collect and process information around every dimension of your sales funnel, such as industry, stage duration and more. This level of analysis provides real- time insights that can be acted upon to measurably improve sales performance.

Question #6

How easily can it connect to my company's existing systems?

If a sales CRM vendor's answer to this question is to hand you a 50-page "quick guide" to its API limitations, this should give you a pretty good idea of the challenges you can expect to face. Future-proof solutions should provide robust APIs that enable, not inhibit, the ability to sync data between your sales software and other systems. Vendors that offer key out-of-the-box integrations and extensive, hands-on API support get bonus points.

Question #7

What resources does the vendor offer to support long-term success?

7

companies use
an average of 7 different
business management tools

Source: Bain & Company

While many vendors vow to acknowledge support issues within a few hours, this is much different from solving them. In fact, many license fees cover minimal support only, with additional fees of up to 25% for "premium support." The quality (and cost) of a vendor's support can be assessed by the volume of materials that current customers have posted online to answer each other's questions. Be sure to select a provider that offers 24/7 live support and is invested in building a partnership with your company, not just looking for upsell opportunities.

Contact us

For more insight into the critical questions you should be asking when it comes to evaluating sales software

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