

How To Select CRM Software

Selecting the right Customer Relationship Management (CRM) system is one of the most important technology decisions a business leader can make. CRM software sits at the heart of sales, marketing, and customer service operations, providing the single source of truth for customer data and enabling teams to manage relationships more effectively.

The challenge, however, is that the CRM market is crowded. From global platforms with extensive feature sets to specialist, industry-focused solutions, the number of options can be overwhelming. Making the right choice requires a structured approach: understanding your business needs, mapping them against vendor offerings, and carefully evaluating which solution will deliver value not just at the point of purchase, but for years to come.

This guide is designed to help business and IT leaders understand the key factors to consider when **selecting** a new system (please refer to other Viewpoint Analysis content for recommendations relating to how to run a software selection process).

What is a CRM System?

A Customer Relationship Management (CRM) system is software designed to help organisations manage and improve their interactions with customers and prospects, and manage their sales pipeline and process. Instead of relying on spreadsheets, emails, or disconnected systems, a CRM provides a central place to store information about every interaction — whether it's a sales call, marketing campaign, service request, or contract renewal.

At its simplest, a CRM acts as a digital address book that tracks who your customers are, what conversations you've had with them, and what stage they're at in the buying or service journey. At a more advanced level, modern CRM systems provide powerful tools for:

- Sales management tracking pipelines, forecasting revenue, automating reminders, and managing opportunities.
- Marketing automation running campaigns, nurturing leads, segmenting audiences, and measuring effectiveness.
- Customer service managing cases, enabling self-service portals, and tracking satisfaction metrics.
- **Analytics and reporting** providing insights into performance, customer behaviour, and business growth opportunities.

In short, a CRM helps you build stronger customer relationships, grow revenue, and improve efficiency across teams by giving everyone access to the same up-to-date information.

A CRM Selection Process

Different companies have different approaches to running technology selection - from the standard RFI and RFP process, to more sophisticated and modern processes that put more emphasis on solving a specific business need and inviting the vendor teams to showcase and sell their approach (our preferred approach).

Whichever approach is chosen, there is going to be an important decision to take - what are the key factors that will be the most crucial ones in determining which CRM solution to select? This document outlines the top 20 factors that we believe, from our experience of running CRM selection processes for companies of different sizes and industries, should be weighed up to make the final vendor decision.



20 Critical Factors in Selecting a CRM Vendor

Here are our top 20 critical factors to assess when selecting a new CRM solution and vendor (in no particular order):

1 - Size and Fit



One of the most common pitfalls in CRM selection is choosing a system that is either too complex or too limited for the business's actual requirements. A platform packed with advanced features may look attractive, but if the organisation doesn't have the processes, resources, or appetite to use them, the result is wasted spend and poor adoption. Conversely, selecting a low-cost or entry-level tool without considering future growth can lead to frustration and costly system changes further down the line.

The key is to balance ambition with practicality. Businesses should start by clearly defining their current priorities — for example, whether the main driver is improving sales pipeline visibility, strengthening customer service, or supporting marketing automation. From there, they can assess which features are essential today versus which may be desirable in the future. By matching requirements to vendor offerings in this way, leaders can avoid over-investing in unnecessary capabilities while ensuring the solution has room to scale as needs evolve.

2 - User Interface (UI) and Usability

Even the most powerful CRM system will fail to deliver value if employees find it difficult or frustrating to use. A well-designed user interface should feel intuitive, with clear navigation, logical workflows, and minimal clicks to complete common tasks. If the system looks cluttered, requires extensive training, or slows people down, adoption will suffer – and the CRM risks becoming an expensive database that no one updates.

Usability goes beyond aesthetics; it's about how easily people can complete their daily work. For sales teams, that may mean quickly logging calls and updating opportunities. For customer service, it might be accessing a customer's history in seconds. For executives, it could be generating reports without IT support. The best-fit CRM is one that aligns with how your teams actually work, reducing friction rather than adding to it.

When evaluating vendors, it's worth running hands-on demonstrations with real users from across the business. Their feedback can highlight potential challenges early and ensure the chosen system is one that employees are confident to adopt - turning usability from a risk into a key driver of success.

3 - Flexibility and Scalability



Like an ERP system, a CRM system isn't a short-term purchase — for many organisations, it becomes a core business platform that remains in place for a decade or more. Over that time, strategies evolve, customer expectations shift, and new technologies emerge. A system that feels like the right fit today may become restrictive tomorrow if it cannot adapt to changing business priorities.

That's why flexibility and scalability should be key criteria in any selection process. Flexibility means the system can be configured to reflect your unique processes without extensive coding or costly custom development. Scalability ensures that as the business grows - whether in terms of users, data volumes, or geographic reach - the CRM can expand alongside it without degrading performance or requiring a wholesale replacement.

When assessing vendors, it's worth asking not only "does this meet our needs today?" but also "how easily will it support us in five or ten years' time?" A platform that can grow and evolve with your business will protect your investment, minimise disruption, and ensure the CRM remains a long-term enabler rather than a barrier to progress.



4 - R&D Investment



Linked to the last point about flexibility and scalability, is how much focus and investment goes into research and development. Vendors will be happy to explain the percentage of investment that goes into their platform, but it's essential to note what this percentage represents (the larger the company's revenue, the more money it equates to) and to ensure they clarify where the R&D investment is allocated. If a company provides more than just CRM, it's essential to determine how much of the revenue actually goes toward the product or service being purchased.

The more money and focus going into R&D - the more likely that the platform will continue to develop and meet the needs of the future and the higher the likelihood that is fit for purpose in ten years or more.

5 - Product Roadmap



As mentioned above, choosing a CRM system is not only about what the platform can do today, but also about where the vendor is taking it in the future. A strong product roadmap signals that the provider understands market trends, listens to its customers, and is actively investing in research and development to stay ahead. This matters because customer engagement practices, data privacy regulations, and digital technologies evolve rapidly — and a stagnant CRM can quickly become outdated.

When evaluating options, ask vendors to share their product roadmap and the priorities driving it. Are they developing new capabilities in areas like artificial intelligence, analytics, or customer experience? Do they demonstrate an understanding of emerging customer needs, such as seamless integration with digital channels or more flexible reporting tools? Just as importantly, are they investing consistently in core performance, security, and usability improvements?

A vendor with a clear, customer-informed roadmap provides confidence that the system will continue to grow in value long after the initial implementation. By contrast, a provider with limited or vague future plans may leave the business facing another costly replacement sooner than expected. Aligning your selection with a partner that is committed to innovation ensures your CRM investment remains relevant, competitive, and resilient over the long term.

6 - Business Stability and Futures



The strength of the roadmap and investment in R&D are only beneficial if the company remains a going concern and continues to operate in the technology area being assessed. Not all technology businesses are profitable, just like not all other businesses are. It's important to take a look at the company's last 3 years of audited accounts and to do a credit check. This can only give an indication of the likelihood of the company being here in the next year or two, but it's important to conduct.

It is also worth considering the vendor and their level of focus on the CRM market. They may be financially stable and in good health, but CRM may be a small part of their overall revenues, or there may be speculation about their future in the market. Will they be producing CRM software in 5 or 10 years' time? Again, we can never be sure, but it is important to consider the chances.

7 - Integrations & Vendor Ecosystem



A CRM system rarely operates in isolation. It sits at the centre of the customer engagement process, drawing in data from multiple sources and feeding insights back to other business systems. From marketing automation and finance tools to service desk platforms and ERP systems, the value of a CRM depends heavily on how well it integrates with the wider technology landscape. Poor integration leads to duplication, data silos, and manual workarounds — exactly the problems a CRM is meant to solve.







That's why it is essential to evaluate how easily a CRM can connect to your existing applications and those you are likely to adopt in the future. Look for vendors that provide open APIs, pre-built connectors, and active marketplaces of third-party add-ons. A strong integration capability not only reduces implementation costs but also enables the CRM to become a genuine "system of record" across the organisation. In our experience, a new CRM platform is usually accompanied by a renewal of other systems or a transformation of the sales/marketing area, so other platforms will be implemented soon.

Closely linked to this is the strength of the vendor's ecosystem. The most successful CRM providers actively cultivate partnerships with complementary technology companies and independent software vendors. This ecosystem creates flexibility: if a requirement emerges — for example, advanced marketing automation, Aldriven analytics, or industry-specific extensions — the business can take advantage of trusted integrations rather than developing custom solutions from scratch.

8 - Implementation Partner Breadth and Depth



While CRM vendors develop and maintain the software, in most cases, the actual deployment is handled by systems integrators, resellers, or specialist implementation partners. The strength of this partner ecosystem has a direct impact on the success of your project. A CRM may look impressive on paper, but without skilled and reliable partners to configure it, migrate data, and align it with your processes, the value will be difficult to realise.

When evaluating CRM options, it's important to look beyond the vendor and assess the breadth and depth of their partner network. Are there multiple credible partners available, giving you flexibility if your preferred provider is no longer suitable or exits the market? Or is your choice limited to just one or two firms, leaving you exposed if relationships break down? Breadth ensures you have options; depth ensures those options come with real expertise.

It's also worth considering the scope of what partners can deliver. Do they cover the full range of services you'll need – from system integration and customisation to change management and ongoing support? Or do they themselves need to subcontract parts of the work, creating additional complexity and risk? A strong, well-rounded partner ecosystem reduces dependency, increases confidence, and ensures that your CRM investment can be implemented and supported effectively for years to come.

9 - References



References are one of the most valuable sources of reassurance when selecting a CRM. Hearing from organisations that have already implemented the system can provide practical insights into the software's performance, the quality of vendor support, and the realities of day-to-day use. The more references a vendor can provide – and the longer those customers have been successfully running the system – the stronger the signal that the CRM is proven, stable, and capable of delivering long-term value.

Industry alignment is also helpful. Speaking with references in your own sector can highlight how well the system handles specific regulatory requirements, customer behaviours, or business processes. That said, many buyers place too much weight on finding references from a near-identical organisation or sub-sector. In reality, a strong and credible reference from a company of similar scale, complexity, or customer focus is often just as valuable. The goal should be to learn from real-world experience — understanding what worked well, what challenges arose, and how those were resolved – rather than seeking a perfect mirror image of your own business.

Well-chosen references provide confidence not only in the technology itself but also in the vendor's ability to support customers over time. They turn marketing claims into tangible proof points, making them a critical part of any CRM selection process.

References should be taken for the vendor - and for the implementation partner.



10 - Artificial Intelligence (AI)



Al has become one of the most talked-about features in modern CRM systems, with vendors keen to showcase predictive analytics, automated recommendations, and intelligent assistants. But when it comes to evaluating solutions, it's important to look past the marketing headlines and ask: Does the vendor have a clear AI strategy, and will it deliver tangible benefits for our business?

A credible AI approach should be more than just cosmetic add-ons. It should be embedded in the platform in ways that improve how your teams work – for example, helping sales managers prioritise opportunities, enabling service teams to resolve cases faster, or providing marketing with more accurate targeting and segmentation. The value lies in practical outcomes, not in features that are rarely used.

When assessing vendors, ask how they collect and train the data that powers their AI, how transparent their models are, and what real-world results customers are achieving. Do they have a roadmap that shows continued investment in AI capabilities, or are they simply responding to market pressure by labelling existing functionality as "intelligent"? Vendors that can demonstrate a thoughtful, long-term AI strategy – backed by customer use cases and measurable results (which may be harder to find due to how recently the technology has been released) – are far more likely to help you unlock real business value.

11 - Industry Fit and Customisations



Some vendors offer industry-specific versions of their platform, pre-configured with templates, workflows, and reports tailored to sectors such as financial services, healthcare, or manufacturing. These can accelerate implementation and reduce the need for heavy configuration.

However, even within a single industry, every organisation has unique requirements. The best CRM systems strike a balance: they offer out-of-the-box functionality that reflects common industry practices while also allowing for customisation. Ideally, this flexibility should not require extensive coding or expensive development projects. Instead, business users should be able to configure workflows, add fields, and adjust dashboards with minimal IT support.

When evaluating options, consider two key questions: Does the system align with our industry needs today, and how easily can it be adapted if our processes change tomorrow? A CRM that combines relevant industry capabilities with user-friendly customisation tools will deliver a faster return on investment and ensure the platform remains a good fit over the long term.

12 - Mobile Capabilities and Usability



In many organisations, the CRM is not just used at a desk - it is a tool that salespeople, service teams, operators, and managers rely on while travelling, visiting customers, or working remotely. That makes mobile access a critical factor in any CRM evaluation. A strong mobile experience ensures employees can view customer records, update opportunities, log activities, and access dashboards directly from their phone or tablet without compromising usability.

Different companies will have different priorities. A field sales team may need quick, offline access to key account information before a client meeting. A customer service team might benefit from being able to check case status while away from the office. Executives may want to glance at performance dashboards while on the move. In all cases, the mobile interface should be functional, responsive, and easy to use — not a stripped-down version of the desktop system that frustrates users.

When reviewing vendors, it's worth testing the mobile application in real scenarios. Does it support the tasks your teams perform most frequently? Is the experience consistent across devices and operating systems? Does it offer offline capability for areas with poor connectivity? Ensuring the CRM is genuinely mobile -







friendly increases adoption, empowers employees, and makes the system a seamless part of everyday work rather than an afterthought.

13 - Data Security **₹**

Customer data is one of the most valuable assets an organisation holds — and also one of the most sensitive. A CRM system must therefore meet the highest standards of data security and compliance. At a minimum, vendors should provide strong encryption (both in transit and at rest), robust access controls, secure authentication, and regular security audits. These safeguards protect against breaches that could damage both customer trust and business reputation.

Equally important is compliance with relevant regulations. Depending on your industry and geography, that may include GDPR, HIPAA, SOC 2, ISO 27001, or other frameworks. Ensuring the CRM vendor has the right certifications in place provides reassurance that customer information will be handled correctly and that the business will remain compliant with legal requirements.

During evaluation, ask vendors to detail their security architecture, compliance credentials, and incident response processes. A credible provider will be transparent about their approach and willing to share independent verification. By making security and compliance a central factor in your selection, you not only protect sensitive data but also strengthen the foundation of trust on which all customer relationships depend.

14 - Implementation Plan and Difficulty

A CRM project does not succeed on technology alone - it succeeds on execution. The quality of the implementation plan can be as important as the software itself. A well-considered, detailed plan shows that both the vendor and their partners understand your business requirements, have thought through the practicalities of deployment, and have the confidence that comes from delivering similar projects many times before.

The best plans go beyond a technical installation. They outline clear phases for data migration, system configuration, testing, and user training. They identify risks and dependencies upfront, allocate responsibilities across both vendor and customer teams, and establish realistic timelines. Crucially, they also include change management activities to ensure employees understand and adopt the system rather than resisting it.

15 - Commercial Model 🏻 🕒 🕽



While cost is always a consideration in CRM selection, too many organisations focus on it too early in the process. That's why we have deliberately placed commercial considerations further down this list — not because they are unimportant, but because they should be evaluated once you are confident the solution meets your business, technical, and operational needs.

A CRM commercial model typically includes both one-off costs (such as implementation, customisation, and training) and recurring costs (licences, support, hosting, and ongoing development). Understanding the balance between these is essential. A system that looks affordable on subscription fees may carry significant hidden implementation costs, while another that appears expensive upfront may offer lower long-term ownership costs.

It's also important to recognise market dynamics. In every procurement process there are outliers — some vendors are far more expensive, while others are suspiciously cheap. Most buyers ultimately choose an option that delivers all the critical capabilities at a sensible, justifiable price point, even if it is not the lowest quote. In many cases, paying slightly more for a system that is secure, scalable, and well supported proves to be the best long-term investment.



16 - Total Cost of Ownership and Return On Investment



When evaluating CRM options, it is important to look beyond the headline licence fees. The Total Cost of Ownership (TCO) includes implementation services, data migration, integration work, user training, ongoing support, and any future customisation. These elements can add significantly to the overall cost of a system and should be factored into decision-making from the outset. A CRM that appears inexpensive at first glance may, once all costs are included, become far less competitive.

Equally, cost alone should not be the deciding factor. A CRM is an enabler of revenue growth, efficiency, and better customer relationships. That's why it's essential to assess Return on Investment (ROI) alongside TCO. The right system can shorten sales cycles, reduce churn, improve cross-selling, or streamline service delivery benefits that often outweigh the financial outlay.

In practice, this means asking not only "what will it cost us?" but also "what will it deliver back to the business?" A CRM that aligns closely with your strategy, drives adoption, and creates measurable business outcomes will often justify a higher investment than one that is cheaper but less effective. Taking a balanced view of both TCO and ROI ensures the final decision is grounded in long-term value, not just short-term cost.

17 - Support Options



Once a CRM system is live, the quality of support becomes just as important as the software itself. Issues will inevitably arise – whether technical glitches, configuration challenges, or questions from end users – and how quickly and effectively they are resolved will shape confidence in the system. That's why it's essential to evaluate the vendor's support model during selection.

Key questions include: what levels of support are offered, and what coverage is available? For example, does the vendor provide 24/7 global support, or only business-hours coverage in a single region? Are different support tiers available, and what response times are guaranteed under each? Understanding these details upfront ensures there are no surprises when you need help most.

In addition to reactive support, many vendors now offer proactive services such as dedicated Customer Success Managers (CSMs). A CSM can act as an advocate for your business, ensuring you get the most value from the platform, sharing best practices, and helping to plan for future growth. Some vendors also provide online communities, knowledge bases, and training portals, which can be invaluable for self-service and continuous improvement.



While functionality, price, and technical capabilities are all critical in choosing a CRM, the cultural fit between your organisation and the vendor (and their implementation partners) should not be overlooked. Every technology project involves close collaboration, and the working relationship can significantly influence the success of the deployment.

Cultural fit shows up in subtle but important ways. Does the vendor listen carefully and adapt to your way of working, or do they push a one-size-fits-all approach? Do they demonstrate transparency and openness in discussions, or do you feel you need to work hard to extract information? Are their teams responsive and collaborative, or more transactional in nature? These factors don't appear on a feature checklist, but they will affect the day-to-day experience of working with them.

It's not the most important element in the selection decision, but it should be weighed alongside others. A CRM that meets your functional requirements but comes with a vendor or partner you cannot build rapport with will introduce friction and risk. By contrast, a strong cultural alignment – where the vendor shares your



values, communicates clearly, and shows genuine commitment to your success – can make implementation smoother and long-term partnership stronger.

19 - Team Feedback

How does your team feel? This has to be a decision that includes them. If it is viewed as a management decision and something they must accept, it will be a challenging period of time. Bring different teams into the decision-making process. Give them a voice throughout the entire process, from requirements building to software demonstrations and final team scoring.

20 - Gut Feel & Trust 🧳



We have deliberately left this factor to the very end, because it is, in many ways, the most important. After weighing up functionality, price, scalability, support, and every other consideration, the final question is simple: which vendor do you trust?

Trust is not about a feature checklist or a contract clause - it is about confidence. Confidence that the vendor will deliver on their promises, that they will support you when challenges arise, and that they are invested in your success over the long term. It is also about instinct: which vendor feels like the right partner for your business?

In most CRM selections, the gut choice is rarely wrong. If all the critical boxes are ticked, and your instinct tells you that one vendor genuinely understands your needs, listens to your concerns, and demonstrates a commitment to partnership, then that is almost certainly the vendor you should select.

Every successful CRM project is built on trust - trust in the technology, and trust in the people behind it. Making your final decision with this principle in mind gives you the best chance of choosing not just a system, but a partner for the next decade or more.

Conclusion

Selecting a CRM system is a significant decision — one that will shape how your organisation manages customer relationships, drives growth, and operates day-to-day for many years to come. This guide has outlined the key factors to consider, from usability and integration through to vendor ecosystem, implementation, cost, and ultimately, trust. Each plays an important role in ensuring the CRM you choose is not only the right fit today but continues to deliver value as your business evolves.

The CRM market is crowded and at times overwhelming, but a structured approach to selection makes the path clearer. By focusing on what matters most to your organisation, testing vendors against real-world requirements, and balancing cost with long-term return on investment, you can move forward with confidence.

The most successful CRM projects don't just deliver technology — they deliver a partnership that helps your business succeed. With the right choice, your CRM will become more than a system of record; it will be a foundation for stronger customer relationships, smarter decision-making, and sustained growth.



WHO ARE VIEWPOINT ANALYSIS?

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We help businesses to quickly find and select new enterprise technology:

• Technology Guides and Reports

Viewpoint Analysis offers a range of free technology guides and reports to assist businesses in the 'read up and research' phase, helping them understand the market and specific vendors before deciding to include them in any future selection process.

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Do you know you need technology, but aren't sure what or where to turn? Our 'Technology Matchmaker' and 'Technology Innovation Series' services bring amazing vendors to your door with new ideas and capabilities. Great for an initial market assessment.

Select Technology FAST

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