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Facing the Challenges of Choosing a CRM System

In 1992 when I started West-Tech Materials, the only thing people knew about a cloud was that it was in the sky. Working out of my house, as a single-rep operation, monthly I was calculating commissions by hand on a tablet, writing my trip reports on paper and faxing them to principals. I made phone calls out of a phone booth or from hotel lobbies.

I had three volumes of the *Thomas Guide* for Los Angeles, San Diego and Ventura Counties that served as my “Google Maps.” My CRM system consisted of a stack of index cards organized alphabetically and by area codes.

As we all have seen, the world of the Internet and computing has been developing at lightning speed. Now we’re continuously being crammed with gigabits of information. Whole industries have developed to manage the information. One of the most effective and powerful tools available to manage that information in our industry is the Customer Relationship Management (CRM) system.

Wikipedia defines CRM as “a system for managing a company’s interactions with current and future customers. It often involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.”

Since the days of working out of the spare bedroom in my house, I am now running an agency with six outside sales professionals and three inside sales support staff. We sell into the medical device and electronics

markets in California and have a database of more than 10,000 contacts.

In the last two to three years, the technological landscape has changed dramatically with the evolution of cloud-based computing. Our CRM systems can now be accessed and managed from just about anywhere.

For large companies, CRM implementation and management typically uses the resources of complete IT departments. For the small to medium-sized companies similar to manufacturers’ rep firms, the onus for CRM often falls on the owner and any of their younger and more computer-savvy employees to identify and implement. The challenge becomes finding a system that is comparable to our business.

In our search we have found three groups of CRM systems:

- Those used in large corporations and able to support staffs of ten to hundreds of sales and marketing people. These systems (e.g., salesforce.com, Microsoft Dynamics CRM and ACT) also have capabilities for smaller more customized versions to accommodate broader needs.

- Those systems that have been developed for specific industry sectors such as the manufacturers' rep businesses. Many of these can be found on the MANA website and in *Agency Sales*.

- Systems that rep firms have been able to customize themselves with the use of an IT consultant or specialist.

Up to now, our company has been running the ACT Database management system. Within the last six months we've moved to cloud-based computing. As a result, a very important criterion for our selection of a CRM system will be the full integration with compatibility with our cloud platform. The challenge has become finding a system that can be integrated into our cloud platform and be able to transfer our existing contact information into the new system. Over the past four months, I have learned that I cannot make the decision alone. I must factor in the needs and input from everyone in my organization and I must spend the time to demo the package or packages I will consider. As a result, I am in the process of working with our IT consultant to initiate the following strategy:

- Survey me and our staff for a list of critical criteria for our CRM needs.
 - Prioritize the list based on most common needs.
- Review, screen and recommend the top three CRM systems based on:
 - Functionality.
 - Ease of use and integration.
 - Cost.
- Review findings and select and set up one or more demos.
- Determine level of training needed and/or additional staff required to maximize effectiveness.
- Set implementation plan.
 - Timing.
 - Training.

I am confident that with this focused effort, we will be able to establish those elements of CRM that are most important to our company, identify the best candidate systems, then demo and select a system that will support the continued growth of our company. I hope to have everything in place by the next issue of *Agency Sales*.

Rick Campo is the founder of West-Tech Materials, Costa Mesa, California. After earning a BS degree in Metallurgical Engineering from Polytechnic Institute of New York (now the NYU School of Engineering), he opened his agency doors in 1992. West-Tech represents manufacturers specializing in the design and engineering of medical products and electronic materials.



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