

# Selecting Your CRM

To Guarantee

**SUCCESS,**

Follow this Practical,  
Down-to-Earth  
Criteria!



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# Introduction

For any company, selecting a CRM solution for a company is a major undertaking. Gartner has just provided an in-depth guide for doing so entitled “[Select the Best-Suited CRM Solution with Gartner’s Evaluation Model](#)”.

Gartner’s guide is meant as a highly technical guide for an analyst, and we’ll be using it as a reference for this ebook. But a point I made recently is that many times the wrong people—often a combination of executive and IT personnel—make decisions for which CRM system a company should adopt. This decision leaves out the people who will actually use it: salespeople. Using another field as an example, an architect would never be allowed to choose the tools that the builders are going to use to construct a house—that decision would be strictly up to the builders themselves. Similarly, I think salespeople should at least be included in CRM selection process.

Hence, this ebook is meant for the potential user, and is a more down-to-earth guide for selecting a CRM solution. That means that *anyone* could select a CRM solution, not just a high-end technical analyst.

Let’s get started!

**Nikolaus Kimla**  
CEO at Pipelinersales, Inc.





“Any sufficiently advanced  
technology is indistinguishable  
from magic.”

— Arthur C. Clarke

## Chapter 1

# Does Underlying Technology Matter?

The first category important for selection is **Product**. This category would include subcategories of Technology, Functionality, Usability, and Speed, which together would make up 55 percent of the decision-making process.

Let's take up the first of these.

## Technology

Many would say that the most important criterion for CRM selection is Functionality—and there I would disagree, and begin instead with Technology. Why? Because you can have great functionality, but if the underlying technology is not right, you can end up having to rebuild the whole app, and the functionality won't make a bit of difference.

So let's begin with technology, and place architecture as the most important aspect of technology. This is very important because, to take an example from another endeavor, you can only build the Burj Khalifa—the tallest building in the world, in Dubai, United Arab Emirates—once. It's a massive undertaking, requiring digging deep into the ground just to sink the foundation. You can't "remodel" it once it's up,

If the architecture is wrong, that affects everything. At Pipeliner, we've really experienced that. We had our user interface—the functionality—totally perfected, but the architecture, due to radical changes in technology in recent years, had to be completely changed.





We had to shift from Adobe Air as the basis of our platform to the latest web technology, HTML 5 Angular JavaScript. It was an enormous project and actually cost us a couple of years. Such a change is more complex with a product such as Pipeliner than it might be with others, as it affects the API services used for integrating with us, the sync services, the cache, storage, networking and more. It was a long, rather painful evolution.

We even changed the underlying database, moving from MySQL (*which a lot of companies still use because it's cheap and easy*) to a more relational database structure.

Because we moved completely into the Cloud, we had to take into account customers who access Pipeliner from anywhere on the planet. We utilize Amazon Web Services, and have 5 data centers throughout the world.

For over 30 years I've been a proponent of open source technology, even participating in a study on it for the Austrian Government when open source was highly unpopular with the rest of the technical world. Today all that has changed—witness Microsoft's purchase of open source software development platform GitHub for \$7.5 billion, and GitHub's over 37 million users. We're running an open source operating system, Ubuntu, in the Cloud for Pipeliner CRM. Technology based in open source makes the most of innovation. The open source community is constantly programming different kinds of components. When you have the right architecture, you can take a component and embed it right into your application.

In my opinion, we have made some very smart decisions about the technology we are using, and are now truly poised to move into the future.



# Other Technology Considerations

The next aspect of technology would be the development environment. If you don't have the development environment totally right, you cannot scale, you cannot build the team, create the architecture and innovate new features.

Another vital consideration is security and privacy. We have all important security protocols in place, and in fact are already (*ahead of the US*) GDPR-compliant. Any company using Pipeliner has no worries about security.



## Crucial Questions

As you can see, technology has a significant impact on your CRM solution decision. Here are some important questions you should ask any vendor of any CRM solution you are considering:

- 1.** If you have a small company with 50 users, and you're looking to subscribe to a SaaS CRM application, you probably won't care about the technology. It runs, so that's good!
- 2.** But if you're a larger company, looking out over the longer term, you're going to want to know that the technology being used in your CRM solution is sustainable. What is the technology underlying the CRM solution? Will it be around in coming years? Or is it something that will become obsolete and have to completely remodeled?
- 3.** What operating system is your possible CRM choice running on?
- 4.** What Cloud service is your potential CRM solution provider using? (*AWS, Microsoft, etc.*)
- 5.** What database systems are your possible CRM solution provider using?
- 6.** What kind of APIs will they be providing you, so you can easily integrate your existing technology?

Make sure you take underlying technology into account as part of your CRM decision-making process.





“The real art  
of conducting consists  
in transitions”

— Gustav Mahler



## Chapter 2

# Functionality

## Features

Just as a note, there is no standard set of terminology for CRM features, like for example you find in the auto industry. When you're shopping for an SUV, a sunroof is a sunroof, and will be referred to that way by every manufacturer. With CRM, there are a few features that have the same names from developer to developer, but with others, features are given "unique" names and it gets more confusing. It's made even more so with new vendors coming on the market and renaming *everything*. Comparing features side-by-side becomes increasingly difficult.

That said, there are some core features that are necessary. But then it comes down to individual evaluation—not every feature is important. Let's take a look at another commonly used application, Microsoft Excel. Excel has dozens of features—but how many of them actually get used? [It is estimated that most Excel users](#) (*not power users*) commonly use between 5 percent on the low end, and 30 percent on the high end, of available features.

## Critical Features For Your Company

What are the core CRM features that are critical to your company, that fall under the category of vital functionality? We can come back to "the right tool for the right job" as discussed in previous articles. You could cut down a tree with an ax, but a chainsaw will be far more efficient, and much faster.



To answer that question, you need to look to the specifics of your own processes. If you aren't familiar with those—or worse, if you haven't fully worked them out—you're really flying blind. The importance of CRM features will be based on the various parts of your processes.

Pipeliner is the only CRM solution that allows you to totally visualize multiple processes in multiple ways. We allow you not only to create different processes for, let's say, different divisions of the company or different product lines, but there are several different views of these processes. Process steps can be divided into mandatory activities for completion of steps. You can examine and analyze lost and past deals, within processes, with the Archive feature. You can even map relationships within prospect companies with our Org Chart and Buying Center.

To compliment our visualization, our extremely flexible reporting system allows you to create management reports easily and on the fly.

## Workflow

As time goes on, processes become increasingly automated. Any CRM application you consider should be able to take into account the many applications and data flows you have within your company.

In line with this, at Pipeliner we have created what we call the Automation Hub. The Automation Hub allows you to link Pipeliner with other applications, so that the data flow through various processes is seamless.

## Manageability

Another crucial aspect of functionality is the manageability of the system. With traditional CRM systems, at least one CRM administrator or outside expert is required for CRM implementation and management. With larger companies who have thousands of employees, more than one full time administrator can be required. Training of an administrator is costly and can take months. Training of users can take weeks or months as well.

Pipeliner makes it possible for a user or manager to learn the system in 5 hours, as compared with weeks or months of other CRM applications. This means you're no longer depending on full-time CRM experts and administrators—anyone can learn it.



You can bring someone new in, and in 2 days they know what to do and can be independent. There is no longer the worry that you'll lose a highly trained CRM administrator who is demanding a higher salary or will leave you in a lurch, because anyone can learn it. Users, managers or administrators can even learn the system online through our learning system.

How much money can be saved? For a larger company, it could be well over \$600,000 in 3 years. The total cost of ownership for an administrator can be well over \$100,000 per year. If you need two of them, that's over \$200,000. In 3 years, that's \$600,000. I say "well over" because there are additional expenses such as insurance, healthcare, workspace including computer, and 401K.



I believe that the evolution of the Cloud had a similar intention. In the old days before the Cloud, a system administrator ran a company's computers, and executives never knew quite what the sys admin was doing. An executive could walk into the sys admin's office, look at their screen, and see nothing but a bunch of incomprehensible command lines. System administrators could, and usually did, constantly demand the latest (*and most expensive*) hardware. "We need a faster server! We need more storage! We need to upgrade the routers, and need faster ethernet!" You basically had to trust what they were saying, as they practically held your computer system for ransom.



But today data centers, server rooms, cooling systems, failover systems, backup systems—all these, on a local level, are things of the past. Now you can just pay a monthly bill to a Cloud service (*Amazon Web Services, in our case*) and everything is taken care of. It's very similar to the ease and convenience we have created for Pipeliner CRM.



## Crucial Questions

As you can see, functionality has a significant impact on your CRM solution decision. Here are some important questions you should ask about any vendor of any CRM solution you are considering:

1. Can you easily compare your company's processes with your potential CRM solution features, and see a fit? In other words, will the potential CRM application directly address and run your company's specific processes?
2. Will your potential CRM solution show your processes visually?
3. Can you run multiple processes in your potential CRM?
4. Within your potential CRM application, can you break down your processes into specific activities that need to be accomplished for a particular process step to be considered done?
5. How easy and flexible is your potential CRM's reporting system?
6. Does your potential CRM application have the capacity to integrate with other applications to create seamless data flows through various applications?
7. Can your potential CRM system be administered by anyone, with brief training?
8. Can users be easily trained on the system (*for example in hours or days instead of weeks or months*)?

Make sure you take all aspects of functionality into account as part of your CRM decision-making process.





# Pipeliner CRM

EXCEPTIONAL ENGAGEMENT. BUILT FOR SALES, USED BY SALES!

[WWW.PIPELINERCRM.COM](http://WWW.PIPELINERCRM.COM)



“I hear and I forget. I see and remember.  
I do and I understand.”

— Confucius

## Chapter 3

# The Importance of Usability

Usability is crucially important when selecting a CRM application, being all about the user (*hence the name*). How complex is the CRM application, or how easy is it to learn and use?

## Simplicity

One method of judging a product is by the number of support tickets it has. If it has many, you know that there are serious issues with usability. An excess amount of tickets can also be an indication of the quantity of bugs the product has—which of course comes back to the usability, too.

In all of Pipeliner development, we apply the principles of cybernetics—the science of simplification. Interestingly we have far fewer bugs and support tickets than our competitors.

Simplicity is never easy to program. Steve Jobs famously said, “Simple can be harder than complex: you have to work hard to get your thinking clean to make it simple. But it’s worth it in the end because once you get there, you can move mountains.” Simplicity is really where the rubber meets the road when it comes to CRM, and is the main difference between ourselves and our competition.





In applying cybernetic principles, we work through 3 different areas:

1. We always have the user in mind, programming everything from the standpoint of the salesperson. While I am the CEO, I am also a long-term salesperson, and am always working with our development team. Normally an application such as ours is simply left to programmers, but with our methodology, Pipeliner is always programmed from the sales mindset.
2. We are constantly working to make our application simpler. Our goal is to have it so simple and clear that it requires as little explanation as possible—and I'll provide examples of that in a moment.
3. The third aspect is to build spectacular visualization into the product. A part of this is to use visual elements such as icons that are universal, that anyone can understand.

As an example outside of our field, think about airports, which exist in places with endless different languages. From airport to airport, the symbols are the same. Think what would happen if the symbol for baggage claim, for example, was totally different from airport to airport. Chaos would result!





In my opinion this is where many of our competitors go astray...and the user is totally lost.

I am always monitoring our competition, and recently came across a new competitor (*I'll save them embarrassment and not mention their name*) that was particularly guilty of this. As a very experienced CRM user (*I am the developer of a leading CRM*), I became totally confused when trying to use this product. The front screen has 6 icons, labeled “Discuss”, “Calendar”, “Contacts”, “Accounting”, “Project”, and “Settings.” This use of terms by itself is confusing, as these should not be separate components, but integrated into CRM itself.

But then just as an example, their calendar is missing much of the functionality you'd find in ours, and in others, too. You don't have standard options such as the ability to make a work week. The main problem, though, is that the calendar is sitting off by itself and isn't embedded into other functions. If you compare it to Pipeliner, you can go into “Activities” for example, and if you need to see the calendar, you can click on it, and see your activities right on the calendar.

## Learning CRM

An important aspect of usability is making the CRM easy to learn—and at Pipeliner we provide multiple ways for users to learn the system. First is the application tour, which thoroughly teaches the basics. Then there is the knowledge base, through which a user can learn any aspect they are curious about. Or, the user can turn to support, and there are two ways to do that: through a support ticket, or online chat.

Another method of making a system easy to learn is to make sure the views and screens are consistent, so that the user knows from one screen to another where to find things. As an example, we keep the same detail screen no matter if you're looking at leads, opportunities, accounts or contacts. For users, this means they can easily find their way around the application and learn it much faster. That was a problem with the other CRM application I was discussing earlier—its screens are different from component to component, and it's easy to become lost.



# What They Like, They'll Use

The fantastic thing about making a CRM easy to learn and use is that users love it. Companies don't have to force salespeople to use it, because they'll naturally take to it. This doesn't happen, I'm sorry to say, with the enormous traditional CRM applications. Companies have to enforce CRM use with penalties for not using it. That's a sorry comment on that CRM.



When an application is really used and loved, users will speak up about it. In our case, [we have many great case studies and testimonials](#) as well as [great reviews on G2crowd](#).

## Yes, Usability Counts!

Why is usability so important? Because without it, you not only lose users, but data. When users hate a CRM, they input data sloppily or not at all. Then all the other functions that rely on that data, such as forecasting and reporting, become unreliable. The reverse, then, is also true: when a system is loved and used, the data is far more reliable, and reflects the real world.



Pipeliner CRM is the best because of its usability. That's really the core of our system, because it's totally usable from beginning to end.



## Crucial Questions

Here are the crucial questions to ask when evaluating a CRM application for usability:

1. While being as powerful as you need it, how simple is the system?
2. It is designed and programmed with the salesperson in mind?
3. Is the application visual so that it's easily understood by all users?
4. How long does it take for a user to learn the system? (*Hint: Pipeliner takes an average of 5 hours, where our biggest competitors take weeks or months*).
5. Look at reviews: do users like the system and use it because they like it?





“Coming together  
is a beginning staying together  
is progress, and working  
together is success.”

— Henry Ford

## Chapter 4

# Service and Cost

In choosing a CRM, how important is service, and how does service tie into cost?

## Support

When deciding on a CRM application—or actually for just about any software application—many companies consider “service” to be synonymous with “support.” This isn’t actually true, as service is the broader category that *embraces* support. Support is, however, very important. If you’re not getting great support, you’re not going to stick with that solution very long.

When it comes to CRM, an important question is: should the support ticket system be part of the CRM application? I don’t believe it necessarily should, as there are several different top-rate support ticket platforms available, such as Freshdesk and Zendesk. Why reinvent the wheel? The CRM should easily integrate with such a platform (*as ours, Pipeliner CRM, can do*), and you can have the best of both worlds.

Pipeliner also offers instant chat, our knowledge base and the product tour as additional support methods.

## The Service Culture

Service and technology are very much two different things. An application can have the best possible technology, usability and functionality in place and running smoothly. But unlike technology, service is something that is actually delivered to the customer. It’s not something that the customer is using, it’s something that the customer experiences.



While “everyone knows” how important service is, and we see it beautifully expressed in company mission and vision statements, the reality of service is—often disappointingly—a different matter. They talk the talk, but don’t walk the walk.



An example just happened within my own household. We’ve had the same family dentist for the last 7 years. My son has a dental situation, so my wife called the dental office and asked if she could get an appointment. The receptionist rudely replied, “No. We have no appointments available.” My wife couldn’t believe it, and pointed out that we’d been patients there for 7 years. Our son needs to be seen. It made no difference. This rude receptionist basically told my wife that she could bring my son in early Monday morning (*when he was supposed to be in school*) or wait until the end of the year when the first appointment was available.

A service-oriented culture obviously does not exist at this dental office.



## Recommendations Follow Service

This dental office not only lost my family as patients, but my wife has now told *all* her friends about this bad experience, too. Which leads to the next very important point about service, and why a service culture within a company is so vitally important.

In this totally transparent digital age, recommendations are the currency. They follow a company and its products everywhere they show up. Recommendations are either gained through great service, or lost through bad service. For that reason, it is incredibly important to train that service culture into every aspect of a company, especially those that touch its prospects and customers in any way.

Unfortunately, humans don't necessarily naturally service people. They can be lazy, unmannerly, selfish, or surly. There can be a freely flowing passage between the heart and the brain—or it can be totally stopped up like a freeway at rush hour. People sometimes are, but often they're not, capable of putting themselves in the shoes of their customers. That is why they must be trained, and management must constantly put attention on it.

Technology is not the hardest thing to change within a company—it is the human beings who deal directly with prospects and customers. That is why a company must embed service directly into its genetic code, which is how we've operated at Pipeliner from the beginning.

Of course, this service culture begins at the top; management must set the ultimate example. It's similar to parents setting the example for children—if the parents set the example, the children will follow. Management are the “parents” in the company.

## Relationship to Cost

Service—along with functionality and usability—is related directly to cost. When a company provides great service, people will generally pay for it. Just think back to the last time you were in a restaurant: if you had a great experience, you left a good tip. If not, you most likely didn't.

Cost correlates with what the customer receives. This means the technology, usability, functionality, and how customers are treated, which is service.



When selecting a CRM, take a look around and see how other customers are responding to it. Take a look at the reviews. Actually contact some users, if you can. The more you will be paying for that CRM solution, the more important it is to look for detailed feedback on it.

## Transparency

Another vital aspect—related to cost as well—is transparency. Know exactly what you’re getting, what features and service will be provided for the money paid. This is another very crucial factor when it comes to our digital world, because a reputation for non-transparency will spread rapidly, and potential customers will soon know about it.



A fantastic example of how *not* to be transparent is given us by cell phone providers. In their contracts there is fine print that it would take a PhD to understand—and generally you don’t understand what it implies until you get your bill, and see pages of charges that you never expected and cannot understand at all. It’s totally infuriating! All these bizarre charges wouldn’t matter so much if they were made clear right up front, and the user understood them. It’s no surprise that cell phone providers are now offering “zero down” to attract customers.





# Simplicity

At Pipeliner, we have always applied cybernetics, the science of simplicity, to make it possible for users and potential users to easily understand our CRM application as well as our charges. Simplicity certainly makes for transparency, and for cost-effectiveness.

A great quote along these lines, attributed to Albert Einstein, is, “Everything should be made as simple as possible, but not simpler.”



## Crucial Questions

When looking for and selecting a CRM application, ask these questions as they relate to service and cost:

1. What kind of positive reviews is this CRM product getting?
2. Specifically, what do users say about service from this CRM provider?
3. How highly do customers rate the CRM provider’s support?
4. How transparent is the solution? Can you easily tell how it will work for you? Can you also tell exactly what you will be charged for?
5. Compare cost with functionality, usability and technology. Is the return on investment fairly obvious?





“Setting an example  
is not the main means of  
influencing others;  
it is the only means.”

— Albert Einstein

## Chapter 5

# Evaluating the Vendor

In this final chapter, let's take up evaluating the CRM vendor—the risk you're taking, and the vendor vision.

A client company, especially a larger company, usually wants to sign up on a contract in subscribing to a CRM. They want to make sure that the vendor is going to be around, and not go out of business in a year.

Overall, I believe that such risk has been greatly reduced by the Software as a Service (SaaS) model. In the past, you didn't subscribe to a service, you actually bought a product and installed it physically at your site. It was an on-premise solution. It wasn't so long ago, maybe 10 years, that on-premise was the majority of all software sales worldwide. This has changed dramatically.

The production, distribution and handling of on-premise software was very different. Vendors had to produce multiple CDs for installation, and phone-book-sized manuals so sys admins would know how to install and use the software. That was certainly a higher risk than it is today. With SaaS, a vendor lives within a Cloud ecosystem and depends on another company, the Cloud provider, to host their service. This is far more affordable for a vendor than having to either host their own service or manufacture CDs and hard-copy documentation. Now highly reliable Cloud services, such as AWS, IBM, Microsoft or Rackspace, provide an extremely stable platform. The actual software solution, then, just consists of the software itself and the support.



There is the risk, as we mentioned in the first chapter, of a CRM solution relying on technology that will soon be out of date and won't be supported. But that is becoming less and less of a risk as time goes by—otherwise there wouldn't be so many software solutions available today.



## Company History

Company longevity is certainly another indication of vendor reliability. In our own case at Pipeliner, we have a very successful history. The original team and myself have been in this industry for over 25 years, and for nearly 20 of those years were also responsible for the development, programming and hosting of a leading global banking compliance solution. We know how it's done, so the risk factor for a company doing business with us is very low.

There is a statistic that states if a company has survived over 3 to 5 years, that the risk percentage is greatly lessened. That doesn't mean it's not possible for a company to still be a risk—a prime example is 100+-year-old Eastman Kodak which, while it was the original developer of the digital camera, [didn't choose to back up digital photography because of the company's business model based in film cameras](#).

It was certainly their loss—they eventually declared bankruptcy (*although they have since recovered to some degree*). But Kodak is a marked exception rather than the rule.







## Choosing Your CRM Vendor

In summarizing, choosing a CRM vendor based on risk and vision is actually not a complex decision. It does require some investigation, as I've laid out here. There are also many online tools that make it easy to compare software solutions with each other. These are primarily based on reviews, and reviews are key—as I've always said, recommendations are the currency of the future. People don't write great reviews if they aren't happy with the product.





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## SELECTING YOUR CRM

To Guarantee Success, Follow this Practical, Down-to-Earth Criteria!

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# NIKOLAUS KIMLA



A 30-year veteran of the computer industry, Nikolaus Kimla has founded and run several software companies. He and his company uptime iTechnology are the developers of World- Check, a risk intelligence platform eventually sold to Thomson Reuters for \$530 million. He is the founder and CEO, developer and publisher of Pipeliner CRM, the first CRM application aimed squarely at actually empowering salespeople and sales management.

Also a prolific writer, Nikolaus has authored over 100 ebooks, articles and white papers addressing the subjects of sales management, leadership and sales itself.