



CRM search » CRM Consultants » CRM Consultant Selection



## CRM Consultant Selection: Learning From Others Experience

★★★★☆ Average rating: 3.5 (from 39 votes)

By Karen Schwartz

### Choose the Right Consultant Before You Choose the Best CRM Software

Few business or IT executives routinely go through Customer Relationship Management (CRM) software selection projects. More often, even tenured executives may perform no more than one or two CRM system selections during their careers. Therefore, looking to outside consultants to bring structure, insight and advice to the CRM software selection process can decrease valuable time, lower risk and increase the probability of choosing the optimal CRM system.

However, choosing the business software consultant who will aid your ERP or CRM software selection can be an overwhelming responsibility. Despite your best efforts, the *consultant selection process* is based on limited information, subjective measurement and claims that are difficult to fully validate; it's therefore quite possible to get it wrong. Learning from the experience of others can add confidence to the consultant selection process. Here are some of the biggest mistakes companies make when choosing software selection consultants.

**Putting the software before the consultant.** No CRM software system rules the industry or even a vertical market. The CRM software market place is fragmented and extremely competitive. Don't be tempted to short change the software selection process by feeling you'll simply end up with a market share leader, and consequently, hire a consultant who's well versed with a predisposed application. Much more important is getting the right business consultant—one that understands your business, the industry, how to manage a project, and can work within your corporate culture.

"I'd much rather have a good consultant with adequate software than a bad consultant with top software," says Robert Distler of WAC Consulting Inc. of Northborough, Mass. "The differentiator really should be the consultant."

**Picking the consultant your friend's company chose, because they're all the same, right?** There couldn't be a worse approach to choosing a business software selection consultant. There is a [consultant selection process](#) you should follow, and shortchanging the process will only add risk to identifying the top CRM software for your objectives and business. Steps include making sure potential consultants are experienced with projects and companies similar to your size, have experience working in your industry, and making sure you see "eye to eye" with potential consultants in terms of work processes, culture and communication. On the other hand, don't overemphasize industry experience. Take the public sector as an example. Often, government organizations value experience in a government setting over all else, including CRM business process expertise. That can be a big mistake; not only does it exclude qualified consultants, but insulates your organization from best practices and lessons learned in other industries that consultants with broader experience can bring to your engagement.

And check out their credentials. Certifications, like PMP (Project Management Professional) and Six Sigma can be helpful, even indirectly. Even if you aren't doing Six Sigma, the process is very methodical and metrics- and results-oriented, and that's ultimately the type of structure and discipline you may want for your software selection project. CRM product certifications with applications such as Oracle Siebel, SAP, Salesforce.com and others can be useful however look for some diversity so that you're not steered to the CRM product your software selection consultant happens to be most familiar with.

**Going with the smoothest talker.** By default, salespeople are smooth talkers. But you won't be working with the salesperson—you'll be working (long hours toward tight deadlines) with a disciplined team. Meet the team, and get a good feel, personality-wise, to determine if it will be a good cultural fit with your organization. Failing to align culturally will turn a challenging project into a frustrating project.

"You have to really relate to the people you are working with, because it becomes pretty personal," says Graeme Nichols, CEO of Arcturus Advisors of Jacksonville, Fla. "You will be working with those consultants every day for a long time, and you need to know that you can relate to them and trust them. Meet the team, and listen to the voice in your head."

**Picking a large systems integrator when a boutique consultant is a better choice, or vice versa.** Just like CRM software systems, all consultants are not equal. All may sound equally knowledgeable in the limited time of initial conversations, but there are more criteria that matter. Here are a few differences.

- If your industry is unique, or requires specific vertical market knowledge, a small boutique consultant with that specific skillset may be a strong choice. If, for example, your company manufactures chemicals for the pharmaceutical industry, your CRM software selection consultant should understand your business

### Share This Article



“I'd much rather have a good consultant with adequate software than a bad consultant with top software.”

~ Robert Distler, WAC Consulting

### Related Articles

- [Choosing The Right CRM Consultant](#)
- [Prepare a Change Management Program](#)
- [Consider Managed Service Providers](#)

### More Articles By Karen

- ▶ [Keys To Managing a Consulting Relationship](#)
- ▶ [2 Step Approach to CRM Consultant Selection](#)

processes and FDA regulatory considerations. Yet another reason to go with a small, boutique consultant is that they tend to be more flexible to do things your way. If that's important, go this route.

- If you are a large, multiple site or multi-national company, you might be best served with a large systems integrator. Larger companies like to hire larger consultants because they have far more specialties and deeper bench strength. But beware—although their expertise is broad and deep, they have processes that work for them, and they are often reluctant to modify them. And with a larger consultant, you may get less personalized attention.
- Value added resellers (VARs) are not independent and should be discouraged for CRM software selection projects. VARs typically specialize in one or a few CRM software systems, receive margin when selling those systems and make much of their livelihoods on the implementation services for those business software applications. Pass on VAR assistance during the software selection, however, seek out their expertise if and when you identify a customer relationship management system that is sold and supported by VARs. ■■

How would you rate this article?  Excellent  Very Good  Good  Fair  Poor

Categories: [CRM Consultants](#)

Tags: [consultant selection](#)

Trackback: [www.crmsearch.com/crm-consultant-selection.php](http://www.crmsearch.com/crm-consultant-selection.php)

Author: [Karen Schwartz](#)

Share:  [f](#) [t](#) [e](#) ...

### Comments

---

Follow Us



[Home](#) | [CRM](#) | [Sales](#) | [Marketing](#) | [Service](#) | [Call Centers](#) | [Channels](#) | [Resources](#) | [Blog](#)