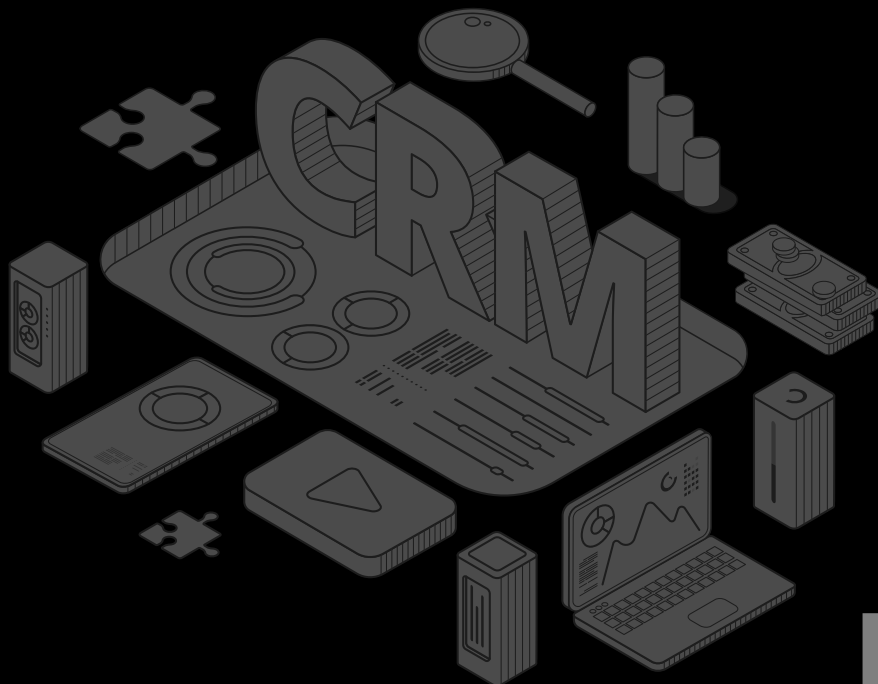


# SILENT REVOLUTION

Why 2 out of 3 businesses are  
dissatisfied with their CRM

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# A SILENT **REVOLUTION** **IS BREWING**

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**01**





## A SILENT REVOLUTION IS BREWING:

The VP of Sales has certain expectations when it comes to their CRM. At the very least, it needs to:



Improve sales productivity, and



Increase revenue per sales representative

The trouble is: The CRM isn't delivering on either front, and false promises from the company behind it are putting a strain on the sales team.

That's not even mentioning the laundry list of other common CRM complaints:

- There's too much tech: The CRM is powerful, but it's not easy to use.
- The CRM is feature-poor and doesn't meet the sales team's needs.
- It's extremely expensive and includes extra capabilities that aren't needed or used.

Depending on their ability to fulfill business goals, the world of CRMs has largely been divided into two main categories:

- 1) Large, clunky CRMs, or
- 2) CRMs based on Democratic design

But why can't it be 'and' instead of 'or'?

**This question is the very reason we're witnessing a silent revolution against large and clunky CRM platforms.**





According to a recent Forrester study commissioned by Freshworks, **69% of businesses** are planning to change their current CRM in the next two years.

The same study showed that legacy CRMs don't fit the needs of the VP of Sales anymore, either. The number one reason for dissatisfaction and the driving force behind considering CRM alternatives were cost and the reliance on IT they entail.

They're built with a top-down approach in mind, full of unnecessary features that bloat the product and clog it up with information that doesn't give the sales team the insights they need.

The good news is that a new wave is coming.



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# QUESTIONS YOU **NEED TO ASK**

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**02**





## QUESTIONS YOU NEED TO ASK

Are you wondering whether you are part of the silent revolution as well?

Sometimes when we're hard-pressed for time, we end up with a solution that doesn't fit our needs.

However, the sooner we start asking the right questions, the sooner we can find a CRM solution that will save us time, money, and energy that we can then invest in business growth.

**It's time for a reality check. Ask the following questions:**

- Has my current CRM delivered on increase in sales productivity & on revenue per sales rep?
- What is the total cost of ownership (TCO) of my CRM?
- Does my team use the CRM we bought as much as they should? If not, why?
- How robust is the quality of our forecasting?
- Does my sales team enjoy using it everyday so they can key in their sales activities accurately?

If you're not satisfied with the answers, you're part of the silent revolution, too.





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# WHAT LED TO **THE SILENT CRM REVOLUTION?**

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**03**





## WHAT LED TO THE SILENT CRM REVOLUTION?

Over the past few years, legacy CRM tools have shown their weaknesses. According to CSO Insights, the performance evaluation of CRM vendors revealed insufficient business impact and slow improvement, especially in the metrics that matter most to sales teams, like win rates, quota attainment, and overall performance.

While salespeople were stuck entering data and juggling tools, their productivity suffered. The result: That lost selling time led to them **closing less than half their forecast deals**.







# IS YOUR CURRENT **CRM RIGHT FOR YOUR BUSINESS?**

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# IS YOUR CURRENT CRM RIGHT FOR YOUR BUSINESS?

You've probably experienced some hurdles with your own CRM. The question is: How do you spot the warning signs that indicate it's time to switch tools?

Here are seven red flags to look out for when assessing your current CRM.

## Expensive upfront costs



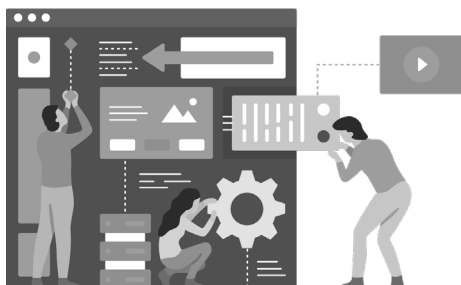
The number one reason why companies want to change their provider is that large CRMs are unaffordable. **Half of the surveyed buyers say cost is a key driver** for replacing their current SaaS CRM solution. What's even more frustrating, in most cases there is a gap between the quoted and post-implementation costs, as well as bloated price due to the trivial features that sales teams aren't even using. Many teams only end up using a fraction of the features that their CRM has built-in--but they still have to pay for all of them, used or not.

## Heavy reliance on IT

One of the biggest hurdles for companies is the fact that legacy CRMs require frequent IT involvement. 35% of respondents in one **Forrester study** cited reliance on IT teams to make changes to their current CRM solution as a driving force behind dumping their existing CRM. Having to constantly allocate IT professionals for deployment and maintenance of your CRM system can hurt the productivity and the efficiency of the whole company--not just your sales team.







## Difficult to integrate

Businesses point to difficulty integrating with other systems as one of the top three challenges with their current CRM solution. According to Forrester, 25% of companies struggle with difficult integration. So instead of being the driver of growth, some CRM platforms are limiting and burdening the entire system due to their rigidity and inability to integrate well with other tools. A CRM should ideally enable your team to avoid juggling multiple tools. Have that in mind the next time you assess CRM providers.

## Bloated, unnecessary features

Besides the fact that legacy CRMs are complex and difficult to understand, they're also often burdened with unnecessary features. According to CSO Insights, **43% of users use less than half the features within their CRM system.** Pay close attention to the features your team actually uses. If you're paying for add-ons and extras but they're not getting used, it's time to look for a new CRM.







## Unintuitive UI

A complex user interface is something many established CRMs have in common. The main objective of CRM systems is to provide the right information at the right time to help sales teams better engage with customers, yet many seem to complicate the task rather than simplifying it. The 2018 Sales Operations Optimization Study by CSO Insights showed that sales professionals spend up to two-thirds of their office hours on administrative tasks such as CRM software management. The work piles up while sales people struggle with unproductive tasks and software management, which is both time-consuming and frustrating. If your team has the same struggle, that's a clear sign the CRM you have is not doing its job.

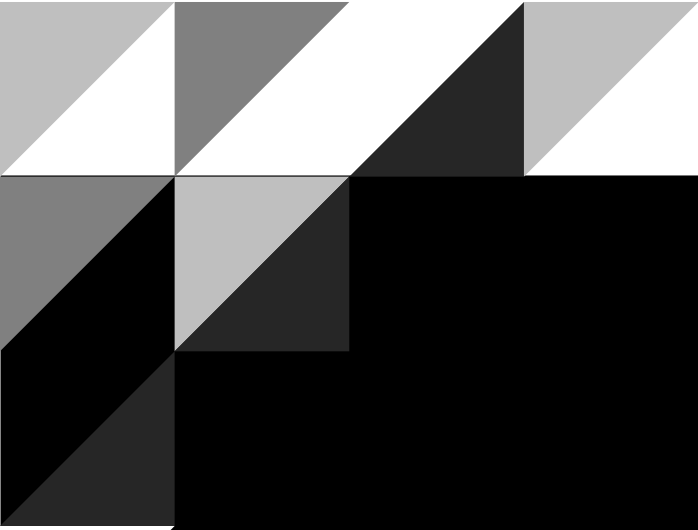


## Lack of democratic design

In today's highly competitive and disruption-prone business climate, companies have to be agile, flexible, and responsive in order to be successful. Solutions that aren't based on a democratic design will never be able to deliver the expected value to your business--and they can seriously affect your growth.





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# SO, ARE YOU **PART OF THIS SILENT REVOLUTION?**

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**05**





## SO, ARE YOU PART OF THIS SILENT REVOLUTION?

Sometimes when companies are hard-pressed for time they end up with a solution that doesn't fit their needs.

However, the sooner you start asking the right questions, the sooner you can find a CRM solution that will save you time, money, and energy that you can then invest in your business growth.







# HOW TO CHOOSE **THE RIGHT CRM FOR YOUR BUSINESS**

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06





# HOW TO CHOOSE THE RIGHT CRM FOR YOUR BUSINESS

Being aware of the flaws of your existing CRM is the first step, but it's not enough. If you don't want to go through all the hurdles once again, you have to know what you are looking for in a CRM solution.

## **Think about the problems you are looking to solve**

Begin with the end in mind. Think about the goals you want to achieve using a CRM, but also the problems and challenges you want to solve. If you don't know where you are going, every road will get you nowhere. Define your goals and expectations upfront and find a vendor that's going to support you along the journey, making your life easier.

## **Understand the needs of your sales team**

Instead of using a CRM that is full of unnecessary features, go one step back and make sure to be mindful of the functionalities your organization really needs. Every business is unique, so the one-size-fits-all approach can make your processes slow and rigid. Talk to the CRM users to get a clear picture of their needs. Go for the solution that can adapt to your requirements, and that will empower your team to sell more.

## **Make sure the CRM is compatible with other systems**

I Don't underestimate the importance of compatibility and simple integration. Businesses nowadays depend on the synergy that multiple systems can create to fuel your performance. Ensuring that the CRM solution can be easily integrated with other applications will help you create a futureproof business ecosystem.

## **Choose a CRM that supports your growth**

You should look at your CRM vendor as a business partner that can help your business grow. Being stuck with a CRM solution that can't keep pace with your speed and transformation can harm your business. What you need is a CRM vendor who can take you to new heights and help you scale.

## **Test the waters with a free trial**

Testing a solution before you seal the deal is always a good idea. During the trial, you can assess the tools, features, and processes and see if they resonate with what you need. Being able to test the strengths and weaknesses of a solution will remove the weight off your shoulders and make your final decision much easier.





# READY TO MAKE **THE SWITCH TO A NEW CRM?**

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**07**





# HOW TO CHOOSE THE RIGHT CRM FOR YOUR BUSINESS

A silent revolution is already underway. Businesses are replacing legacy CRMs with flexible and intuitive solutions. The new wave of SaaS CRM solutions has taken a fresh, bottom-up approach.

The intuitive interface, plug and play functionality, and democratic design will help you attract leads, engage in contextual conversations, close deals, and nurture long-lasting customer relationships.

## Are you going to be part of the revolution?

Switching to a new CRM system doesn't have to be a daunting task.

**Here are a few tips that can help you get through the process painlessly:**



Decide on the CRM platform that fits your needs.



Prepare the team for the change.



Secure a data backup.



Test the migration process with smaller data samples.



Migrate the CRM data.

Make sure to use the tips outlined here to select the right solution for your business and keep in mind that the CRM you choose needs to deliver value across the entire customer lifecycle to ensure a consistently exceptional customer experience.

If you want to learn more about the challenges faced by businesses just like yours as well as what they look for in a CRM, be sure to check out this in-depth report.





# ABOUT FRESHWORKS

Freshworks provides innovative customer engagement software for businesses of all sizes, making it easy for teams to acquire, close, and keep their customers for life. Freshworks SaaS products provide a 360 degree view of the customer, are ready to go, easy to use and offer quick return on investment.

Headquartered in San Mateo, Calif., Freshworks' 2,500+ team members work in offices throughout the world. For more information, visit [www.freshworks.com](http://www.freshworks.com).

Founded in October 2010, Freshworks Inc., is backed by Accel, Tiger Global Management, CapitalG and Sequoia Capital India. The company's cloud-based suite is widely used by over 150,000 businesses around the world.

