



CHECKLIST: TOP 10 SIGNS YOU NEED SALES SOFTWARE

Wondering if your business is ready for a customer relationship management (CRM) solution? Not sure it's worth the investment? Use this checklist to determine whether or not you really need a CRM.



1 You have no system in place to centralize your data.

Are spending more time looking for customer information, rather than interfacing with your customers? A spreadsheet or email is not a CRM!



2 You cannot keep up with following your leads and deals.

You are already pressed for time. You want to make sure that no leads or deals are left behind. But how easy is it for you to follow up on leads with Post-its and spreadsheets?



You have no visibility of what your sales and inside sales team is doing.

Have a sales team? What is its focus this week or even this month? Is the workload balanced or are some reps struggling with massive amounts of tasks, while others seem to be cruising along?



You are struggling with major communications issues.

Are you constantly managing communications issues and fed up with the left hand not talking to the right hand? This makes for a painful and inconsistent sales process, both internally and for your customers.



You don't know where your leads are coming from.

Quick, tell us where did your most valuable leads and profitable customers come from? A cold call? Your website? A referral? An email campaign? Pay-per-click ads? A tradeshow? Without insight into your leader sources, you may be wasting a lot of your hard-earned dollars on ineffective or sub-optimal commercialization strategies.



You are generating great traffic on your website—but no conversions.

You have invested time and money into developing a website that touts the value of your products and services. But is it a mean-green conversion machine? Do you lack the tools to measure your performance?



You feel as though organizing marketing campaigns is way too time-consuming.

Proactive marketing does take some planning and time; however, without it, you cannot ensure customer retention and business growth.



Your sales and accounting information is in silos.

Is it hard to follow up on sales goals and monitor progress? Do you feel like your billing cycle extends past what is financially viable and impacts your cashflow? Are you fed up with your sales and accounting teams working separately, with no clear visibility into your overall company growth?



Customer complaints are becoming increasingly the norm.

Do you operate in a competitive landscape where you feel more like a commodity that customers select based on price? Do you lack access to your customers' purchasing history and have no idea how to offer a stellar customer experience that market pundits keep raving about? Does saving customer accounts keep you up at night?



You lack access to simple reports and dashboards.

Reporting is such a time-consuming task; do you ditch the analysis just to keep up with customer demand? Do you feel as though you lack the data to make well-informed decisions that can boost your productivity and feed you actions plans?

If you are looking to eliminate the sales and marketing chaos, a CRM just might be right for you.

CHECK OUT CENTRIXONE'S FULL-FEATURE TRIAL TODAY!