A Method of Rapid Evaluation of a Multi Purpose CRM

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Abstract

Evaluation and selection of a Customer Relationship Management (CRM) system for an organization is a complex and time-consuming process, which has all the difficulties and risks of selecting any type of enterprise-level software. Additional evaluation complexities arise for the organizations, where a versatile CRM will be used by many departments with disparate functions and a variety of the customer service processes. This paper presents a method that allows a newly formed CRM evaluation project team to perform a quick evaluation of the commercially available CRM platforms. The method makes use of reliable sources of information readily available on the internet, often without a charge. Minimal spreadsheet skills required to process information in a consistent and verifiable way, and present it in a visually compelling and clear format for further discussions. The method directs a project team to a focused area of vendors/solutions, which have the highest likelihood of being relevant to the goals of implementing a general purpose CRM for a diverse multi-unit organization.