



HAVE YOU OUTGROWN INFOR CRM (SALESLOGIX)?

7 signs it's time for a CRM change.

How to Evaluate an Outdated CRM System

Like people, companies often have a natural aversion to change. After all, the stakes are high in today's rapidly evolving business landscape, with new technologies and trends creating new opportunities for businesses to succeed — or to fail.

Particularly when it comes to new technology, business owners can feel overwhelmed. Which CRM solution is the best pick? Should you implement it yourself, or connect with a third party? Is it worth the cost? And, most intimidating of all... how do you even begin to overhaul the way you and your employees have been doing things for so long?

Having spent over 20 years in the CRM industry, we've seen this firsthand with clients reconsidering their out-of-date customer relationship management (CRM) systems, particularly those still using Infor CRM (formerly known as Saleslogix).

Why is an Infor Migration Intimidating?

Often, our clients have either built a wealth of data within various folders and

spreadsheets, in antiquated CRM tools that function as little more than rolodexes, or are relying upon a combination of both. These outdated information management systems cause painful inefficiencies they're well aware of — yet they still find themselves afraid of and resistant to change.

Why? Maybe you've found yourself stressing over some of the same questions: Which CRM system should you migrate to? How will you get all that data moved over, and without losing anything? How long will it take to get it set up? How much is it going to cost you? And, when all is said and done, will your employees even use it — or will it just cause more of a headache for your organization?

7 Signs you Need a CRM Change

1 | Your CRM doesn't match your process

We find companies often fall into three categories when they realize their CRM tool isn't fulfilling their needs. For some, when first starting out, they made their initial solution decision with a limited budget or without much time spent on research. This resulted in a subpar tool from the get go. Others may have chosen the best technology available at the time, but have found it hasn't aged well or been properly maintained and updated, leaving you with a slow, limited version.

Perhaps most frequently, however, are businesses that find they have outgrown their solution. While their CRM system once met their needs, the organization has grown and evolved, implementing new business goals and internal processes that the CRM system simply wasn't designed to serve. Whatever the reason, if you find your CRM solution can't provide key functionality to support how you do business — such as tracking client leads and sales performance, creating tasks and calendar appointments, and setting up automated workflow processes that integrate with business and marketing applications — it's time to consider a new platform.

2 | The data is limited or unreliable

Another common complaint about legacy CRM systems is that there aren't enough data input options, or that much of the data is junk. And as the adage goes, "You're only as good as your data." If your current CRM system isn't configured to not only gather a wealth of critical data, but to organize and connect it in ways that drive actionable insights, ask yourself:

What does this mean for sales representatives and marketing professionals attempting to use the system to look up company information, create buyer personas, and identify histories and trends to aid in their outreach efforts?

Inaccurate or incomplete data undermines your staff using the system. Ultimately, this translates to drains on your bottom line. In fact, bad data costs organizations nearly \$3 trillion annually across all industries, according to Harvard Business Review.

3 | Your system won't talk to others

While CRM is crucial to any organization, it's certainly not the only tool your business relies upon. Your system needs to integrate seamlessly with other software and plugins to help your sales, marketing, and customer service teams do their jobs efficiently and effectively. If you're not currently connecting these solutions centrally through your CRM platform as a single system of truth, you'll likely struggle with conflicting or duplicate data, redundant manual entry and inefficient workflows, and a disparate picture of your customer base and sales activities.

4 | You lack reporting and forecasting ability

For most companies, sales results aren't the only metric critical to measuring sales team performance. An effective CRM system should track the sales and marketing activities and interactions throughout the entire sales process, easily analyzed through a customizable reporting dashboard.

Equally important is the ability to forecast future sales through an accurate and user-friendly forecast tool. Your CRM should take the guesswork out of both short- and long-term pipeline forecasts, equipped with dynamic fields such as probability, volume and status.

If your CRM lacks robust sales reporting and forecast functionality, you're seriously handicapping not only your sales staff and management, but company leadership's ability to make informed decisions based on projected revenue.

5 | Your CRM lacks workflow automation

Many outdated CRM systems function as a digital address book, without workflow automation capabilities.

We commonly design workflows that help our clients automate key milestone tasks within their internal processes, such as customer follow up tasks, marketing outreach, alerts and reminders, and departmental approvals. Such tasks are key to generating leads for your business, and moving them smoothly through the buyer lifecycle.

If your legacy CRM platform doesn't have functionality to unite sales and marketing efforts to generate and convert leads to sales — with workflow automation to streamline the process —you're missing out on high-value CRM functionality.



6 | It can't keep up with you on-the-go

Companies are increasingly expanding beyond traditional brick and mortar operations — with employees traveling back and forth between working in the office and out in the field, accessing systems from airports and hotels while traveling, or working in a completely virtual capacity from their home or local coffee shop.

If you have staff that fit any or all of these descriptions, it's important they can remotely access your CRM system quickly, easily and securely. This means it must also be available through mobile, email, and web-based channels — a key requirement for your increasingly mobile team.

If your CRM doesn't facilitate out-of-office access with multichannel capabilities, you're wasting productivity and likely alienating an expanding pool of remote-savvy talent, as well as potential clients.

7 | There's no support

If you're still reading this, we assume one or more of these CRM system red flags resonates with your current situation. But you may be asking yourself — do I really need to migrate to a completely new solution, or can I simply update my current system?

While we help our clients explore the update options available through their current CRM solution provider, we run into many legacy CRM systems that no longer provide ongoing support and development. Or some, such as Infor CRM (formerly known as Saleslogix), may provide one-time updates for a fee — which is just a temporary fix until the next upgrade and fee.

In either case, the lack of ongoing free updates is a clear sign your current CRM provider isn't investing in their system to ensure it keeps up with new technologies and trends in the market to best serve your business. What's more, the lack of ongoing updates will likely cause compatibility issues with other key business systems over time.

We find it's more cost-effective, in most cases, to invest in a modern, well-maintained solution — particularly if you're still using Infor CRM (Saleslogix).

You need Microsoft.

As customer relationship management (CRM) experts with 20 years of expertise, we've worked with many CRM solutions, and heard customer's highest praises as well as their most frustrating complaints.

Our job boils down to helping companies evaluate their current systems and potential replacements to find the best fit for their organization — as well as execute migrations when the bad outweighs the good, that's why we recommend Microsoft Dynamics 365 for all of your CRM needs.

Gold
Microsoft
Partner



Dynamics 365 is one of the market's leading solutions for salesforce automation, marketing, and customer service.

User Interface | When we migrate customers from Infor CRM to Microsoft Dynamics 365, one of the first improvements they notice is the intuitive, web-based user interface (UI) which allows for effortless navigation, comprehensive data views, and automated workflow features. Microsoft Dynamics 365 excels out-of-the-box with numerous functionality improvements.

And while both Microsoft's and Infor's UI's are customizable, here again we've found that Microsoft takes the lead. The Dynamics 365 system has an extensive toolbox of features to configure the system without the need for hiring a developer. It takes far less time and effort to tailor Microsoft Dynamics 365 built-in capabilities than it does for Infor. No proprietary technical knowledge is needed, and Microsoft provides comprehensive online documentation and learning portals to enhance the end user's experience.

System Updates | One of the biggest drawbacks we've identified with regard to Infor CRM is its reliance on manual, time consuming updates that typically require hiring a 3rd party consultant to complete with every new release.

Due to budget and resource constraints, this often means businesses are working with outdated versions of Infor CRM (formerly Saleslogix) – which can cause compatibility issues amongst a network's integrated systems including end user computers and devices. Even after a costly update has been executed, compatibility issues can remain, affecting

a business' efficiency and bottom line.

Conversely, Microsoft delivers seamless no-cost, automatic updates for Windows, Dynamics 365, and Office 365 to continually improve functionality while maintaining the integrity of integrations, functionality, configurations and customizations.

Integration | While Infor users can leverage third-party developers to create software integrations through Application Programming Interfaces (APIs), Microsoft Dynamics 365 has the unparalleled ability to integrate with the full suite of Office 365 applications right out of the box, including Outlook, SharePoint, Word, Excel, OneNote, PowerBI and OneDrive, just to name a few.

Notably, Microsoft Flow integration enables businesses to automate workflows and unite business processes between Dynamics 365 and over 200 other popular applications and services. Additionally, AppSource, Microsoft's app store, gives you the freedom to seamlessly add-on and test-drive professionally developed apps that further enhance out-of-the-box capabilities. comprehensive online documentation and learning portals to enhance the end user's experience.



Price | Many of the above comparisons detail how we've seen Infor CRM (formerly Saleslogix) result in higher costs for users we've worked with, from extensive third-party customizations to ongoing, expensive system updates. Microsoft Dynamics 365 can not only reduce these and other costs for a lower annual spend, but can help organizations realize a reduction in IT overhead if they are not already using an online solution.

We often run into the concern over cost to migrate from Infor CRM (or an older Saleslogix version) to Microsoft Dynamics 365. Depending on the size of your business' database and degree of customization required, you may believe that it could be cost prohibitive to migrate despite the potential benefits of moving to Dynamics 365.

Recognizing this need among many of our own clients, TrellisPoint has developed an innovative Infor Migration service that enables our team to migrate your data from Infor CRM (formerly Saleslogix) to Microsoft Dynamics 365 in half the time – for less than the cost of upgrading to the latest Infor CRM version.

Migrate to a better in half the time – for half the cost!

Understanding the pains our customers continue to face with their outdated CRM systems, particularly Infor CRM (Saleslogix) users, TrellisPoint has developed solutions to ease the pain of migration.

Our Infor Migration service makes it easy and cost-effective to migrate your data from your outdated Infor CRM (or outdated Saleslogix) system to the latest version of Microsoft Dynamics 365. Knowing our way around both systems, our experienced team can not only migrate all of your data quickly and accurately – but do so while ensuring you don't lose crucial business data.

Our experts can also work with you to identify CRM process improvement opportunities, make recommendations for enhanced functionality, assist with data clean up, and ultimately design a CRM solution tailored with the right fields, record types, and workflows to drive impact for your business.

Try it out with our 30-day free trial, and migrate up to 10,000 of your business accounts and contacts from Infor CRM (Saleslogix) to Microsoft Dynamics 365.

We'll provide the proof at no cost or obligation to you.