

NEW RESEARCH

Choosing the Right CRM to Align Teams

An inside look at how sales, marketing & customer service teams are leveraging their CRM for a better customer experience.



insightly

Research created in partnership with Ascend2

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INTRODUCTION

When utilized to its fullest, a customer relationship management (CRM) system can provide businesses of all sizes and industries a host of benefits. These systems can be a catalyst for achieving the goals of individual departments and the organization as a whole.

According to the research that follows, the top two strategic priorities in the year ahead for all mid-market organizations surveyed are revenue growth and improving the customer experience. But leveraging a CRM that actually helps deliver an exceptional customer experience that ultimately drives revenue needs to be implemented across multiple teams and throughout the customer journey, which is no easy task.

That is why we created Choosing the Right CRM to Align Teams survey: To discover how over 500 B2B sales, marketing, customer success, and sales/rev/mar operations professionals from mid-market organizations are utilizing CRMs across their organizations in order to drive growth.

What are your top strategic priorities in the year ahead?

Growing revenue

72%

Improving the customer experience

55%

Reducing costs

42%

Growing staff

31%

Improving/unifying customer data

30%

Aligning departments

17%

Mitigating risk

15%

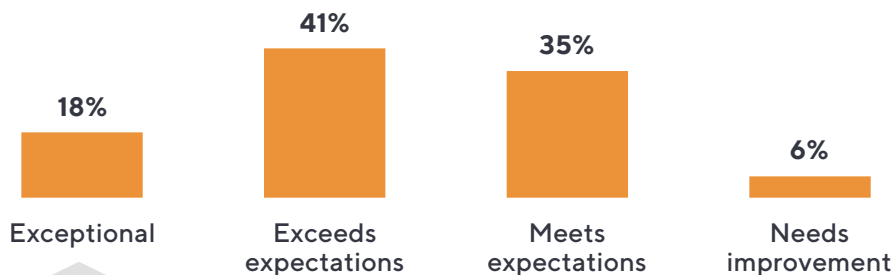
INTRODUCTION

Poor customer experiences are costing organizations in a big way.

The interactions your organization has with customers are, well, everything. At every touchpoint across every stage of their journey, customers expect to be known and heard. Consistency, value, and personalization are now essential to meeting the needs of today's B2B customers.

But according to our research, there is significant room for improvement when it comes to delivering extraordinary experiences. Overall, only 18% of those surveyed say they are delivering exceptional customer experiences.

How would you rate the overall experience a customer has with your organization?



This group gives us particularly valuable insight into the inner workings of how the “best-in-class” function and you will see them referenced throughout this report as *Best-in-Class Perspective*.



What is at stake?

So what is actually at stake for businesses delivering less-than-stellar customer experiences? Revenue. **Those with the best customer experiences are 2.5X more likely to report significant growth than all others.** Over one-third (36%) of those who rate their customer experience as “best-in-class” report a significant increase in revenue growth last year, compared to just 14% of those who delivered less-than-exceptional customer experiences.



Overestimating your customer satisfaction?
New research shows you're not alone.

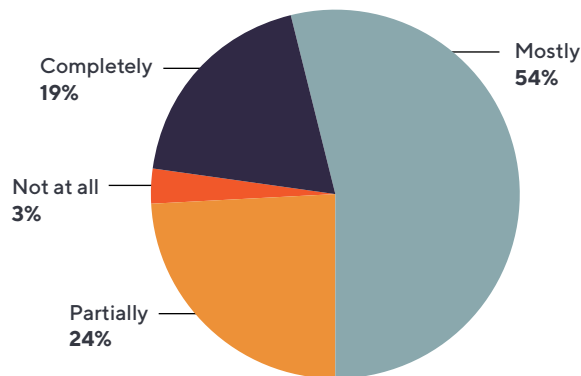
1.0 ALIGNMENT DRIVES GROWTH

Alignment drives growth

At the bottom of the list of strategic priorities in the year ahead is aligning departments. This is a problem. Aligning adjacent departments such as sales, marketing, customer success, and operations teams requires unifying their data and supporting technology to enable a complete view of the customer across their entire journey with your brand.

But just one-in-five (19%) organizations surveyed report having aligned technology and customer data used by marketing, sales, and customer support/success teams. Our research indicates that those with completely aligned technology and customer data see a myriad of benefits.

To what extent are the technology and customer data that your marketing, sales, and customer support/success teams use aligned?



Over one-third (36%) of companies with completely aligned technology and customer data across their marketing, sales, and customer success teams saw a significant increase in revenue last year (compared to just 14% of those with less alignment).

The bottom line: alignment drives growth.

Better Alignment Means Better CX

While 43% of those with complete alignment describe the experience a customer has with their brand as exceptional, only 11% of those with less alignment are delivering exceptional experiences.

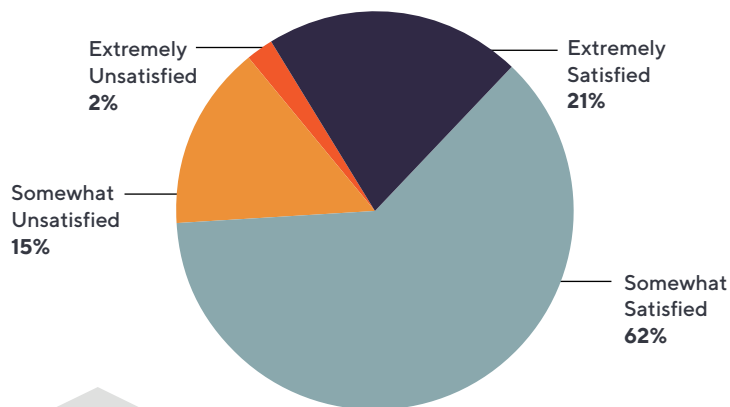
2.0 AN EFFECTIVE CRM CAN ALIGN TEAMS

An effective CRM aligns technology and data

So how do we align technology and data across teams? An effective CRM unifies the data and technology that can be used to drive growth.

In fact, 95% of those who are extremely satisfied with their CRM solution have mostly or completely aligned technology and data across teams.

Level of satisfaction with current CRM solution.



Sales teams are reportedly the least satisfied with their current CRM solution with nearly one-quarter (22%) saying they are somewhat or extremely unsatisfied.

Benefits of an effective CRM

The top benefits of effectively utilizing a CRM according to those who are extremely satisfied with their solution, include better customer data (including quality and completeness), more organized and streamlined processes, improved customer experience, and higher sales.

What are the most important benefits of effectively utilizing a CRM solution?

(Extremely Satisfied with current CRM segment)

Better customer data (quality / completeness)

44%

More organized / streamlined processes

43%

Higher sales / faster growth

40%

Improved customer experience

36%

Better customer retention

32%

Higher quantity of leads

27%

Improved velocity

26%

Reduced manual effort

23%

2.1 AN EFFECTIVE CRM CAN ALIGN TEAMS

How are organizations managing customer relationships?

A 60% majority of mid-market organizations are using a formal CRM tool (either a low cost small business CRM, a mid-market CRM, or an Enterprise CRM). 15% have an internally developed system that they utilize to manage customer relationships and another 17% use spreadsheets.

What are you currently utilizing to manage customer relationships and interactions?

Small business CRM (free or low cost)

21%

Mid-market CRM

25%

Enterprise CRM

14%

Spreadsheets

17%

Internally developed tool/system

15%

No formal tool

8%

Only 8% of those surveyed report not having a CRM solution to manage customer relationships.

This group reports not feeling a need to do so (24%) and too much time/resources required to implement (18%) as their top reasons for not implementing.

Only 5% of this group reports delivering an exceptional customer experience.

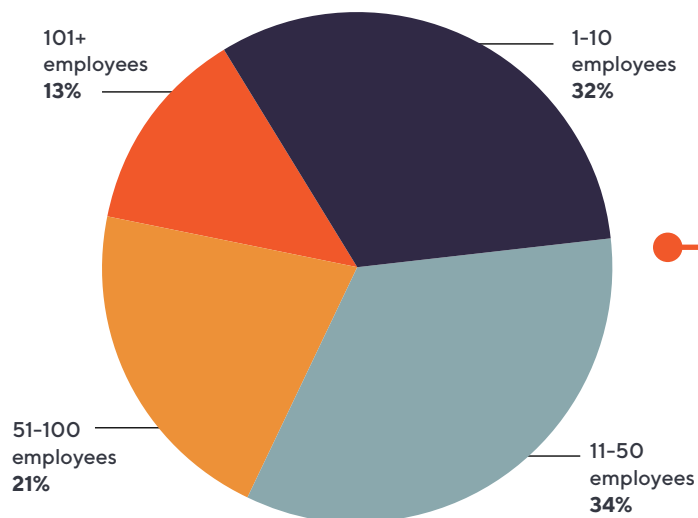
Those who utilize formal CRM tools (low or no cost, mid-market, or enterprise solutions) report **more satisfaction** with their current solution than those using an internally developed tool or spreadsheets.

2.1 AN EFFECTIVE CRM CAN ALIGN TEAMS

The problem with enterprise solutions

Approximately how many employees make up your department/team?

(Enterprise CRM users segment)



Enterprise CRM users are significantly more likely to complain about initial and ongoing cost of their CRM (41% of Enterprise CRM users list this as a top complaint vs 24% of all others).



Bought too much? See how easy it is to switch from Salesforce to Insightly. **Calculate your savings.**



Two-thirds of enterprise CRM users are from departments with 50 employees or less.

This signals that these organizations have over-invested in a solution they likely underutilize.

3.0 SELECTING THE RIGHT CRM

Current Shoppers

Over one-third (34%) of organizations will be shopping for a CRM in the coming year. This group of shoppers lists the top priorities driving their search as improving workflows and processes as well as improving the customer experience. This is yet another indication that the right CRM drives workflow alignment between teams and a great customer experience.

What are the top priorities driving the consideration of a new CRM?

Improving workflows / processes

50%

Improving customer experience

45%

Aligning marketing / sales / customer success teams

42%

Reducing costs

37%

Consolidating technology

34%

Unifying customer data

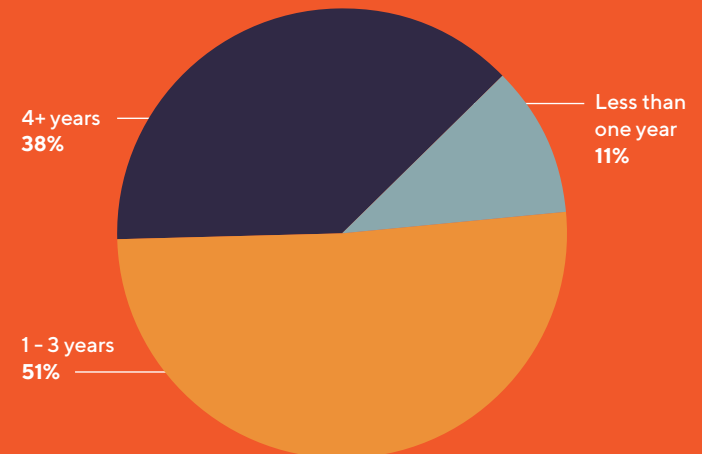
31%

Improving adoption / utilization

30%

The importance of finding the right solution.

How long have you been using your current CRM solution?



Nearly two-thirds (62%) of those surveyed report having used their current CRM solution for three years or less. Interestingly, 41% of this group report that their organization will be shopping for a new CRM solution in the coming year. It is important to thoroughly evaluate CRM options and find a solution that answers the top priorities of your organization.



Shopping for a CRM? Put Insightly on your list.

Get your personalized demo today.

3.1 SELECTING THE RIGHT CRM

Biggest Complaints

The top complaints about the current CRM being used overall are missing or inadequate features (28%), cost (27%), and difficulty customizing (26%).

These top listed complaints vary by job level. Those in executives and VP roles are most concerned with the inability to scale and initial and ongoing costs while managers and directors feel strongly that their CRM solutions are missing important features or are hard to customize (require code).

What are your biggest complaints about your current CRM solution?

Managers & Directors

Missing / inadequate features	29%
Difficult to customize / coding required	28%
Initial or ongoing costs	27%

VPs & Executives

Lack of scalability	27%
Initial or ongoing costs	26%
Missing / inadequate integrations	25%



Key Decision-Makers

There are disparities between departments about who is driving the decision-making for a new CRM solution. **Sales and Marketing both believe that their respective departments have almost equal weight in the decision-making process as executive leadership.**

3.2 SELECTING THE RIGHT CRM

Key Considerations

What are the most important things to consider when evaluating CRM solutions? Half (47%) of the sales, marketing, customer success, and operations professionals report that ease of use should be at the top of the priority list for a CRM tool. A solution that is easily implemented into existing systems and painless to utilize across teams is critical to ensuring strong adoption.

What are the most important aspects to consider when evaluating a new CRM solution?

Ease of use / adoption

47%

Price

44%

Ability to integrate with existing systems

39%

Cross-team functionality (e.g. marketing, CRM, service in one app)

35%

Flexibility (ability to customize to needs)

34%

Cloud vs. installed

18%

Lead and pipeline management features

18%

Mobile app

14%

Low code / no code

11%

98%

of those with completely aligned data and technology agree that a CRM tool is more effective if more employees across different teams properly utilize it.

3.4 SELECTING THE RIGHT CRM

Essential functions and features

Sales, marketing, customer success, and operations teams interact with CRM features differently. To encourage alignment, it is important for purchase decision-makers to address the needs of each team and how they might utilize a CRM solution.

Which CRM functions/features are most essential to your job? *(Segmented by department)*

Sales

Sales forecasting	36%
Dashboard views / reporting & analytics	34%
Document management	25%

Marketing

Dashboard views / reporting & analytics	33%
Email sending / tracking	29%
Document management	28%

Customer Success

Document management	41%
Dashboard views / reporting & analytics	30%
Email sending / tracking	29%

Sales/Rev/Mar Operations

Dashboard views / reporting & analytics	34%
Document management	33%
Security (e.g. SOC compliance, encryption, 2FA)	28%

A unified customer view

Across all teams, dashboard visualization of reporting and analytics is essential. Creating a unified view of the customer is imperative to providing an exceptional customer experience. Over two-thirds (68%) of those surveyed report having customer data stored in multiple locations. Storing customer data across several different platforms limits access across teams and ultimately results in an uninformed and disjointed journey.

A 360-degree unified customer view often includes the following data:

- **CRM and customer data**
- **Behavioral data**
- **Marketing channel interactions**
- **Sales representatives' interactions**
- **Support tickets**
- **Project status**

By enabling this unified customer view, organizations are given a better understanding of the customer. This allows for improved personalization and a better overall customer experience, not to mention more efficient workflows and processes.



Learn more about the benefits of a single customer view.

4.0 IMPLEMENTING A CRM SOLUTION

Top challenges to implementation

Implementing a CRM solution across an organization not only requires full buy-in from several departments but also allocated time and resources dedicated to executing the roll-out strategy.

Training time plagues 43% of those surveyed when implementing a CRM solution. Integrating with existing systems, followed by data migration and complexity are also top challenges for those surveyed.

Training Tip

To encourage adoption through the implementation process. Schedule role-based training for your managers and users with your CRM.

- For reps, walk them through the new user experience, how to create, edit, and track their opportunities and contacts
- For managers, show them how to use dashboards and reports, as well as create custom list views and workflow automation to stay on top of their team's open deals

What are the most significant challenges when implementing a new CRM?

Training time

43%

Integrating existing systems

40%

Data migration

37%

Complexity

31%

Time / expense for customizations

30%

Disruption to business

25%

Adoption

24%

Ongoing support / training new hires

24%

Training time ranks #1 across all department sizes as well as all departments.

4.1 IMPLEMENTING A CRM SOLUTION

Integrating with existing systems

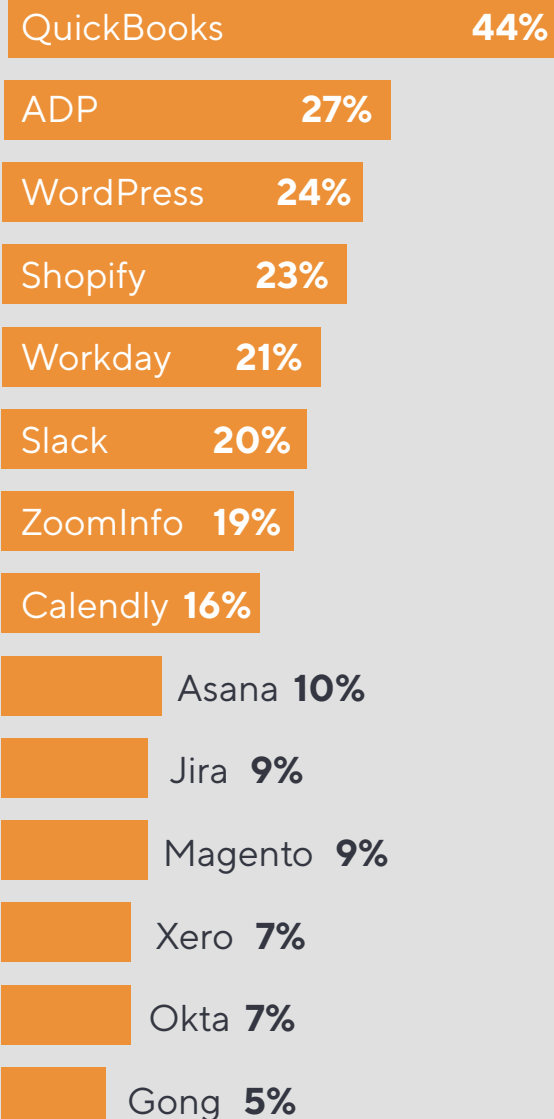
For 40% of those surveyed, integrating a new CRM into existing systems is a major challenge during the implementation process. A CRM that can speak to the rest of your technology stack ensures data accessibility throughout your organization and enable a unified view of the customer.

The most useful integrations according to those surveyed are QuickBooks, ADP, and WordPress, but this varies by who you ask. Sales puts Zoominfo among the top of this list while Customer Success and Ops professionals place a higher value on Workday.

Connect Insightly CRM with 500+ tools using **AppConnect, a low-code/no code integration tool.**

93% of those surveyed would adopt a project management tool if it was native to their CRM tool.

What are the most useful/essential integrations into your CRM system?



4.2 IMPLEMENTING A CRM SOLUTION

What is there to lose?

Failed implementation of a CRM can cost organizations greatly. Not overcoming these challenges results in employee frustration, wasted staff time, and missed opportunities for revenue according to 51%, 44%, and 43% of those surveyed respectively.

What are the biggest consequences of not overcoming these challenges?

Employee frustration

51%

Wasted staff time

44%

Missed opportunities for revenue

42%

Poor customer experience

38%

Wasted budget

35%

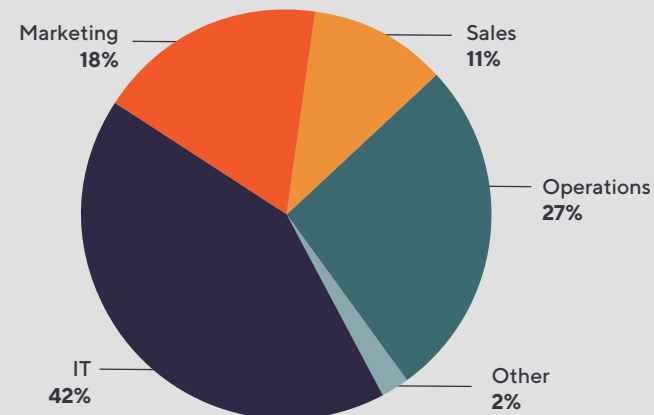
Tension between teams

26%

Who's responsible?

The IT department is most responsible for implementing integrations, customizations, general maintenance of CRMs according to 42% of those surveyed.

Who is responsible for integrations, customizations, and maintenance of your CRM solution?



Participants and Methodology

Participants

Department

Sales	32%
Marketing	33%
Customer Success / Support / Service	15%
Sales / Rev / Mar Operations	20%

Job Title

Executive / Owner	17%
Vice President / SVP	16%
Director	21%
Manager	46%

Industry

Banking / Financial services	7%
Business / Professional services	20%
Government / Public Sector / Education	6%
Healthcare / Pharma / BioTech	7%
Manufacturing / Retail / Wholesale	24%
Telecom / Energy / Utilities	2%
Technology / IT	12%
Transportation / Logistics	3%
Other	19%

Methodology

Ascend2 benchmarks the performance of business strategies and the tactics and technology that drives them. With a custom online questionnaire, our “Choosing the Right CRM to Align Teams” survey was fielded throughout the month of April, 2022 to a panel of 511 professionals representing sales, marketing, customer success, and related operations teams and who self-identified as management through higher-level job functions such as directors, VPs, and executive roles. These individuals represent business-to-business (B2B) organizations in the US with 50 - 500 employees across several industries.



About the Research Partners

insightly

Insightly elevates the customer experience by aligning sales, marketing, and service in one platform. Built to deliver key customer insights across all teams, Insightly's unified CRM helps organizations sell smarter, grow faster, and build lasting customer relationships. Insightly is trusted by more than a million users worldwide.

Ascend2
RESEARCH-BASED MARKETING

Companies partner with Ascend2 to create original research, from survey conceptualization through report and content creation to media outreach. Ascend2 helps companies fuel marketing content, generate leads, and engage prospects to drive demand through the middle of the funnel.

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