# Why switch to Insightly CRM

A comprehensive guide to switching CRMs

insightly

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# Introduction

Whether you've already decided to leave your current CRM or are just exploring options, one thing is clear—the status quo is not working. Having invested time, money, and effort, you might be wary of change, dreading the entire data migration to a new CRM and worried that it won't be scalable or powerful enough to address your unique business needs. These are all valid concerns, and we put together this guide on switching to Insightly to help you navigate the decision-making and buying process with more knowledge and confidence.

# Why Insightly

Built from the ground up with the latest technology, Insightly is a modern unified CRM that provides businesses of all sizes and industries with secure, flexible, and powerful sales, marketing, and delivery solutions all in one place, without the high cost and complexity of legacy CRMs.

Insightly's unified approach reflects the need for modern businesses to make data-driven decisions, create consistently great customer experiences, and compete in the digital consumer age. With Insightly you can finally centralize all customer data, align teams throughout the entire customer journey, automate processes, and measure performance to make data-driven business decisions. Gain access to enterprise-grade capabilities in a much simpler, more user-friendly interface and at a fraction of the cost.

## Power

Insightly provides scale, flexibility, security, and powerful CRM capabilities out of the box, without the high cost of legacy CRMs, like Salesforce. You can customize Insightly to your specific industry and business requirements and team preferences. Insightly uses the scale capabilities of the Amazon Web Services (AWS) platform—which is almost an infinite scale— to store extreme amounts of data and analyze them in a very fast time frame.

Vetted and approved by Gartner Inc., the #1 technology advisory firm in the world, Insightly CRM is one of only 15 vendors that Gartner includes in its annual Sales Force Automation Magic Quadrant market report alongside Salesforce, Oracle, Microsoft, and SAP.[1]

## Transparency

Insightly's pricing is clear and straightforward. You always know what you're paying for, when, and why. No hidden costs. Most importantly, you don't need to hire expensive external consultants to help you implement Insightly and train your teams. Insightly has all the resources you need in-house to get you up and running quickly and with the fastest path to positive ROI in mind. On average, it takes half the time to set up and start using Insightly than it does to implement legacy CRMs.

In a recent customer survey, 70% of respondents reported positive ROI within the first year of implementing Insightly CRM.[2]

[1] Gartner Magic Quadrant for Sales Force Automation 2020
[2] Insightly Manufacturing Customer Survey, 2019

### Simplicity

While legacy CRMs are popular, their outdated technical architecture and design philosophy requires that you almost need to be an expert in these systems to get your money's worth. By contrast, Insightly's simple and intuitive user interface (UI) requires minimal training and ramp-up time and makes it easier to integrate your CRM into every team's daily work and existing business processes.

In a recent Insightly customer survey, 57% of respondents said they considered "easy adoption and use" as a key factor in choosing Insightly and 77% reported using it daily.[3]

At the end of the day, it doesn't matter how powerful any system is—if its intended users don't fully adopt and incorporate it into their work, it's hard to get a high ROI.

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## In this guide

This guide covers Insightly's recommended switchover process for a smooth transition, seamless implementation, and fast time to value.

Whether you follow all four steps or just glean details on Insightly's switchover process, we hope this guide will help you to prepare for your CRM switch with more confidence and clarity.

[3] Insightly Manufacturing Customer Survey, 2019

# 4 steps to a successful CRM switch

The Insightly Team is available for guidance and assistance at every step.

# Step 1: Assess your CRM needs

Regardless of your current or past CRM setup and usage, conducting a CRM needs assessment will help you to decide on which data you will migrate to Insightly CRM and clarify your CRM goals in light of your overall business strategy. It will also help you to determine the scope of features and capabilities, customizations, integrations, and user preferences. Finally, CRM needs assessment can serve as a benchmark to measure your ROI after the implementation.

## Decide on how you will perform your CRM needs assessment

Decide on who is going to be involved in the switchover process. Consider forming a cross-functional team that includes senior leaders along with mid-level and frontline users, so you have both big picture and daily user perspectives across different business lines.

Make sure to include current/future CRM administrators and an IT person in your CRM needs assessment taskforce. It's also helpful to have at least a couple of outside-the-box thinkers on the team.

While you need a cross-functional team to collect feedback and execute the plan, you also need someone who will rally the troops, hold everyone accountable, and ensure successful delivery, i.e. someone who will own the project. This might be your lead IT resource, a sales leader, or data and operations manager.

When selecting a project owner, look for someone who is detail-oriented but also understands the bigger picture and is a good communicator.

# Determine your CRM goals

Defining your CRM goals has less to do with features and more to do with outcomes. Use these goals to foster greater alignment among stakeholders and focus on and measure what matters the most to your business.

You can get as specific as it makes sense for your business and use a familiar framework like SMART (Specific, Measurable, Achievable, Relevant and Time-based). Work with an Insightly rep to assess your CRM goals and plan the entire switchover process from there.

Set specific benchmarks that make the most sense for your business and business stage. For example: achieve a 90% MQL-to-SQL ratio, lower new customer acquisition costs by 5% in six months, reduce annual operational costs by 15%, and/or grow annual revenue by 20%.

# Collect & analyze feedback

Put together a plan for soliciting feedback from across the organization. You'll probably get a mix of detailed and brief responses. For a more data-driven approach, design a brief survey that addresses the common pain points, such as disorganized information, poor client and supplier management, inefficient collaboration with team members, and difficulty managing projects.

As you collect feedback and begin to analyze the data, you might notice a few common threads. Consider using the following categories to group ideas, issues, and feature requests: important features, cost and licensing, scalability, integrations, and support.

# Create a needs checklist

Use the team feedback and your business and CRM goals to create a CRM needs checklist. Your list can include must-have CRM features and capabilities, cost, and other factors.

Here is a checklist example:

- Contact management
- Sales automation must-haves (product and price catalogs, quote books, territory management, etc.)
- Marketing automation must-haves (campaign management, email marketing, lead scoring, etc.)
- Lead management
- Project management
- Workflow automation
- Integrations
- Customer data management
- Data analytics and reporting
- Customizations
- Mobile CRM
- Security
- Data transfer/switchover management
- User training and ongoing support
- Implementation requirements
- Total cost of ownership

# Step 2: Clean & structure data

Insightly CRM is your opportunity to start fresh and leave the junk behind. Bad data creeps in over time. Common examples of bad data include duplicate records, unused custom fields, overlapping tags, confusing dropdown menus, and various hacks/workarounds.

Before switching from your current CRM system to Insightly, challenge your team to identify only those records, fields, and objects that are truly needed. You can always save the "extras" in a CSV file, in case someone needs that data later.

You can easily clean your data in Insightly CRM, but it's best to start with a clean slate. Taking a somewhat minimalist and deliberate approach could offer additional clarity, reduce confusion, and expedite CRM success.

# Step 3: Define roles

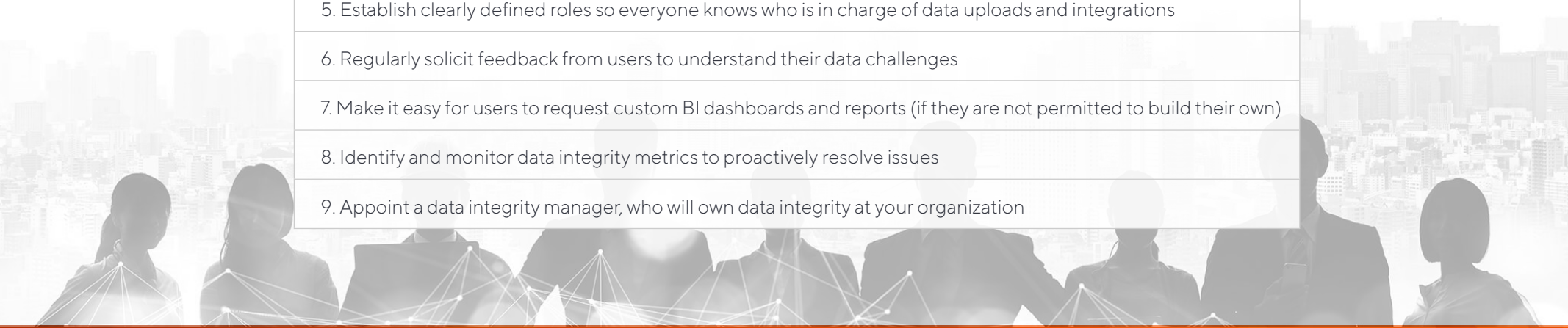
To ensure ongoing data integrity, define user roles and assign user permissions accordingly. Identify your 'administrators' with advanced permissions and visibility and regular users with limited or simple permissions.

Start with a simple hierarchy of roles and reporting and assign user permissions based on roles and scope of usage.

Once you transfer all your data, remember to audit user roles and permissions on a regular basis, as users can be a major cause of data integrity issues. Errant data uploads, accidental record deletions, and bad habits can quickly erode the reliability of your customer data.

As with any company-wide initiative, maintaining data integrity should be hardwired into your organization's way of doing things. Here are a few ways to infuse data integrity best practices into your company culture:

1. Limit user access to only the systems and permissions they need to perform their jobs
2. Create work instructions and operating procedures for collecting and modifying data
3. Use out-of-the-box system functionality and limit custom fields whenever possible
4. Integrate data integrity into your onboarding process for new hires
5. Establish clearly defined roles so everyone knows who is in charge of data uploads and integrations
6. Regularly solicit feedback from users to understand their data challenges
7. Make it easy for users to request custom BI dashboards and reports (if they are not permitted to build their own)
8. Identify and monitor data integrity metrics to proactively resolve issues
9. Appoint a data integrity manager, who will own data integrity at your organization



# Step 4: Review

Although there's no one-size-fits-all formula for quantifying return on investment, here are a few tips to help you start measuring Insightly CRM performance after you've implemented the system.

Circle back to your CRM goals (which you set during the needs assessment stage of the switchover) to track progress. Get specific.

You can use Insightly's out-of-the-box dashboards or build custom dashboards with drag and drop. Easily organize, view, and share dashboards with key performance indicators (KPIs) across sales, marketing, and delivery.

An example of a sales dashboard in Insightly CRM.

### Make your KPIs accessible

Defining a bunch of KPIs offers minimal value without transparent reporting. Use Insightly CRM to build custom reports and dashboards and slice and dice the data for analysis that's most relevant to your business. You can then convert all the data into charts or export to CSV format for further analysis.

### Automate the review process

KPIs are often ignored unless they're woven into a formal review process. If you already have an operational review process, build custom CRM reports and use insights in strategy discussions and business decision-making.

### Continuously tweak & refine

No process is perfect on day one. But by setting clear goals and tracking KPIs, your team will be in a much better position to make adjustments. Be sure to occasionally ask for candid end-user feedback. What do they like about your CRM? Are users creating unnecessary workarounds? Collecting this type of qualitative data will supplement the quantitative data found in your CRM reports. And, the Insightly team will be there along the way to help you make the most out of your CRM and reach your business goals.

# Customer Story

## Digital marketing agency saves 40% by switching from Salesforce to Insightly

Founded in 2005, PCG Digital is a New Jersey-based marketing agency that offers search engine marketing (SEM), social media advertising, search engine optimization (SEO), and content creation services. The agency specializes in helping car dealerships across North America to leverage digital strategies to grow their brands and build better customer relationships.

"Our sales team tracked their deals in Salesforce, which could not communicate with our project management and marketing systems," says Jamie Paton, Director of SEO at PCG Digital. "Customer onboarding and engagement was difficult and time-consuming because we lacked a single source of truth."

The team also needed flexible reporting capabilities that would allow them to provide rapid answers to time-sensitive requests from clients about budgets and service delivery. Vehicle manufacturers offer co-op marketing programs to help dealers advertise, but these programs can be complicated and require accurate reporting and documents for reimbursement.

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"Insightly provided us with specific instructions on what to do to prep the data before we cut over. We were able to seamlessly jump on board with Insightly; the process of getting everyone up and running took about four weeks from start to finish... Transitioning from Salesforce to Insightly allowed us to reduce our costs by 40%."

Jamie Paton
Director of SEO

Seeking to overcome data silos, improve program reporting capabilities, and reduce costs, PCG Digital began evaluating its tech stack and turned to Insightly as the right solution for their unique needs.

"Without Insightly, gathering key information used to take a full day, at least. Now it takes 15 minutes," says Paton.

Within four to six weeks, the PCG Digital team were all set and ready to use Insightly. Insightly's personalized training and support reps worked with PCG Digital to transfer all their Salesforce data, ensure a seamless transition for the team, and elevate their productivity.

Since implementing Insightly, PCG Digital has experienced increased levels of collaboration and productivity for a total cost of ownership that's 40% lower than that of Salesforce.

# Reasons to switch now

Switching CRMs is an important investment that carries consequences for your entire business. It requires stakeholder buy-in, planning, and research. Reluctance to change and the painful reality of having invested a lot of time and money in the current system can make staying with it feel like a safer choice.

To make an informed decision, assess your CRM needs in light of your business goals and crunch some numbers. You may find that staying with the status quo is riskier and costlier than switching to a CRM that better meets your business and budget needs. The sooner you switch, the sooner you'll start saving.

## Here are a few factors to consider as you make your decision.

### Data migration costs

Data migration is included in your Insightly CRM plan, it is not going to cost you extra. You don't need to hire a consultant or spend staff time on figuring it out. Insightly takes care of data migration for you.

### User training & support costs

Insightly is a user-friendly CRM that doesn't require extensive ongoing user support. The enterprise plan provides you with ongoing user support at no additional cost.

### Customization costs

All your customizations are factored into your CRM plan from the get-go, no hidden costs.

## Current & long-term costs of maintaining the status quo

Calculate your current CRM subscription and support fees. Has this expense remained relatively constant over time? If it has increased, then determine by what percent annually. If you have to hire consultants to manage the system or implement changes, how much does that support cost you annually? What are the intangible opportunity costs of staying with your current CRM?

## CRM cost

Use Insightly's total cost of ownership (TCO) calculator to compare costs between Insightly CRM and a legacy CRM, like Salesforce. See for yourself how much you can save with Insightly on these costs:

- Number of licenses
- Time horizon (in years)
- Training per user
- Implementation costs
- Priority phone support
- Priority email support
- Number of proactive account reviews per year
- Priority access to new features
- Admin cost per user
- Cost of full-time CRM admin

## Make an informed decision

If you ask the right questions, gather all of the relevant data points, and synthesize the data in a way that makes sense for your unique business circumstances, you'll be able to make an objective, sound decision that addresses your current CRM needs and aligns with your long-term vision.

# Next steps

Switching CRMs is an important investment that requires stakeholder buy-in, planning, and research. We're here to help you along the way. Reach out to our team and let's start your switch to Insightly CRM.

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# About Insightly

Built from the ground up with the latest technology, Insightly is a modern unified CRM that provides businesses of all sizes and industries with secure, flexible, and scalable sales, marketing, and delivery solutions all in one place, without the high cost and complexity of legacy CRMs.

1.5 million+ users

25,000+ businesses

180 countries

All industries

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