HOW TO CHOOSE A CRM YOU WON'T REGRET

Most CRM problems start before you sign.

What we believe about choosing a CRM, and what to do at each stage of the decision.

THE PROBLEM

59%

of software buyers regret a purchase they made in the past 18 months.

In our experience, most CRM regret is set up before anyone signs, through unclear ownership, requirements written during vendor demos, and implementations nobody checks independently.

Source: Gartner Digital Markets, 2025 Software Buying Trends

WHAT WE BELIEVE, 1 OF 3

01

Most CRM failures start as procurement failures.

The software is rarely the first thing to go wrong. Strategy, requirements, ownership and vendor selection set the conditions for everything that follows. When those are right, most mature platforms can work. When they're wrong, no platform fixes them.

WHAT WE BELIEVE, 2 OF 3

02

Write your requirements before you see a demo.

Every vendor will say yes to almost every question. If demos shape your requirements, you end up choosing the best presentation instead of the best fit. Weigh what your business needs first, then ask each vendor to show how they deliver it.

WHAT WE BELIEVE, 3 OF 3

03

Advice should come from someone with nothing to sell you.

We don't resell CRM software and we don't implement it. That independence lets us tell you plainly which platform fits, whether your team is ready for it, and whether your implementation partner is delivering what you paid for.

STAGE 1 OF 4

Exploring

This is you if: We think we need a new CRM.

Agree on the problem before anyone looks at software.

THE MISTAKE TO AVOID

Shopping for a platform before the business agrees on what it needs to fix and who owns the outcome.

WHAT TO DO NEXT

Write down the two or three results the CRM must deliver, and name the executive accountable for them.

> **36%** of buyers who regretted a software purchase wish they had clarified goals and outcomes first.
>
> Source: Capterra 2025 Tech Trends

STAGE 2 OF 4

Comparing

This is you if: We're seeing demos and vendor pitches.

Make vendors prove what they claim.

THE MISTAKE TO AVOID

Letting demos write your requirements, when every vendor says yes to almost every question.

WHAT TO DO NEXT

Agree on weighted requirements before the next demo, then score every vendor against them the same way.

> **73%** of buyers who rely solely on vendor-provided information end up regretting the purchase.
>
> Source: Gartner Digital Markets

STAGE 3 OF 4

Choosing

This is you if: We have a shortlist and need to decide.

Check the fit and the full cost before you sign.

THE MISTAKE TO AVOID

Picking the highest scorer without pricing what it costs to run, or checking that it fits how you work.

WHAT TO DO NEXT

Price the whole decision, including administration, integration, migration and training, then set a decision deadline.

> **33%** of buyers who regretted a purchase blame a higher-than-expected total cost.
>
> Source: Gartner, Why Software Buyers Experience Regret

STAGE 4 OF 4

Implementing

This is you if: We've signed and the build is under way.

Keep the build accountable to what you bought.

THE MISTAKE TO AVOID

Assuming your implementation partner will hold itself accountable, with nobody independent checking the build.

WHAT TO DO NEXT

Tie each milestone to the outcomes you bought the CRM for, and schedule independent checkpoints along the way.

> **43%** of buyers who regretted a purchase point to a poor handoff from vendor sales to implementation.
>
> Source: Gartner Digital Markets, 2024

Resources for this stage stratanorth.co/crm/#implementing

WHERE ARE YOU?

Find your stage, then take the next step.

1 **Take the CRM Readiness Assessment**

12 questions, about 3 minutes, with a report on where your team's gaps are.

2 **Get the Vendor Capability Matrix**

The weighted scoring template we use with our clients.

3 **Talk to Mario**

30 minutes with an advisor who has spent 26+ years in CRM and has no software to sell.



stratanorth.co/crm

Everything in this guide, plus free tools for every stage