

Do you and your CRM
have a future?

 **SugarAI**

Welcome to your CRM compatibility test

Whether you're an account manager, sales leader, exec, or work in IT or Finance, chances are you've got a relationship with your current CRM (or whatever you use instead of a CRM). And chances are, that relationship isn't a great one.

Most people have been in relationships with their CRMs so long they've settled for what they've got, not knowing a better match is out there.

To help figure out whether you and your CRM have a future, we've put together a little compatibility test. Think of it as the marriage between a maturity assessment and the sort of compatibility test we all did when we were a little less mature.

We're hoping you'll find this fun, but it should also help you to identify capabilities and features you might be missing from your current setup.

Oh, and we end with the five most important questions you need to ask any potential CRM vendor to make sure

you end up with a partner that brings out the best in your organization.

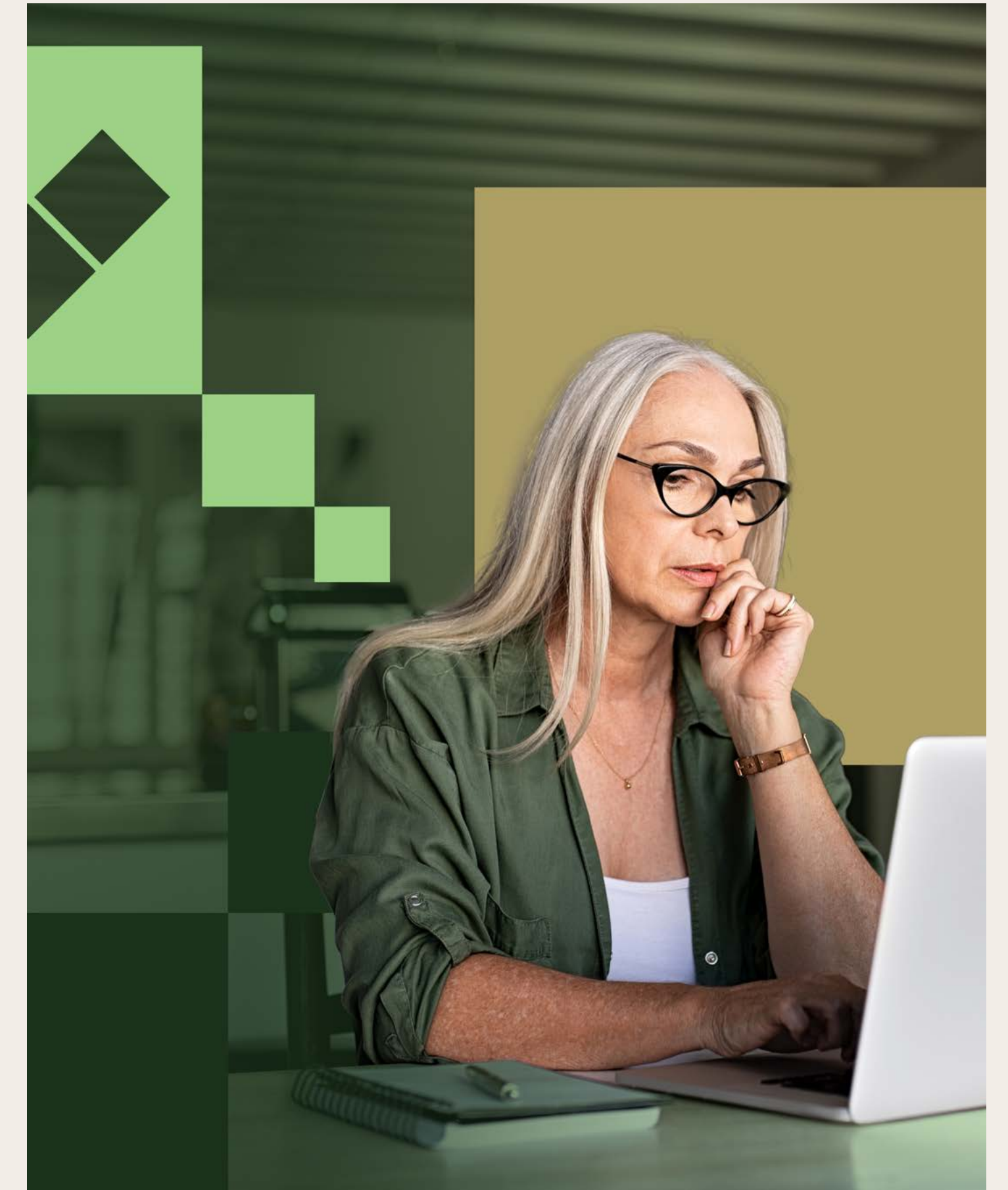
And we don't mean your winning smile. We mean getting all your teams (and players on those teams) operating at the level of your top performers. Creating opportunities. Closing deals. Driving revenue.

All while reducing IT burden, increasing visibility for leadership, and improving ROI.

We're going to give you a number of different scenarios, and you answer a, b, c, or d (each worth a different number of points) based on what sounds most like your relationship. Don't worry if they don't align completely (or if you're not pleased with your answers), you don't have to share your results with anyone.

Make a note of your score as you go, and at the end you'll tally up your total and we'll let you know whether you've got a future, or if they need the boot.

Shall we?



Let's talk about your relationship with your CRM

One of your customers orders less than they usually do on a product they always need. Do you find out:

- a. A year later when they shift all their business to a competitor 1
- b. Three months later at your QBR call 2
- c. A month later when you notice the dropped revenue 3
- d. Instantly because your CRM flagged it and told you to call them 4

Score:

You need to walk into a leadership meeting with an accurate revenue forecast for next quarter. Do you:

- a. Chase 15 reps for spreadsheet updates the night before, then manually consolidate 1
- b. Pull the CRM's forecast report and quietly add a 20% confidence buffer because you know the data is stale 2
- c. Get a report that's directionally right but you can't explain the methodology when the CEO asks 3
- d. Pull a real-time forecast dashboard with deal-level visibility, weighted by AI scoring on actual customer signals 4

Score:

You need to justify your CRM spend in next year's budget. Do you:

- a. Have nothing to justify because it's a line item nobody questions and nobody loves 1
- b. Have nothing to justify because it's bundled with another system and treated as sunk cost 2
- c. Know exactly what the CRM costs but struggle to attribute revenue impact so end up with a gut-feel ROI argument 3
- d. Pull a dashboard showing pipeline influenced, deals accelerated, and revenue lift tied to CRM-driven activity 4

Score:

Did you know?

Only 48% of sales reps use their CRM consistently (Gartner)



Total score so far:

It's not you
IT'S THEM

Let's talk about your relationship with your CRM

Your customer would buy another of your products if they knew you sold it. You find out because:

- a. On a visit you happen to see them take delivery of that product from someone else 1
- b. On their year-end call, you try upsell adjacent products 2
- c. You dig around in your CRM and discover other similar customers have bought that product 3
- d. Your CRM automatically surfaces the opportunity based on the buying behavior of other customers 4

Score:

You want to activate a new sales process to break into a new market. Your team:

- a. Gets to it, with much gusto but varying results because everyone is kinda doing their own thing with varying levels of success 1
- b. Has to amend the sales play to work in the way the CRM operates, or does it how they want but then can't track it in the CRM 2
- c. Activates the sales play but then has to spend a lot of time manually updating the CRM rather than selling 3
- d. Hits the ground running thanks to a CRM that guides next best action and updates automatically based on customer behavior 4

Score:

One of your sellers is about to jump on a call with a customer. To prepare they:

- a. Chomp a scoop of creatine and wash it down with a protein shake 1
- b. Ask ChatGPT about the recent history for the customer 2
- c. Look in the CRM for the last thing they wrote about them 3
- d. Read the automated report the CRM surfaces based on company changes and buying behavior 4

Score:

Not-so-fun fact

60% of sales leaders say their CRM doesn't help with forecasting or real-time coaching (Forrester)



Total score so far:

**It's not you
IT'S THEM**

Let's talk about your relationship with your CRM

You're responsible for making sure leadership has clean, complete CRM data. In practice that means:

- a. Asking sellers to enter data they don't want to enter, can't be incentivized to enter, and that goes stale the moment they do **1**
- b. Building mandatory field requirements, then policing weekly to make sure they're filled in (and still only getting half the picture) **2**
- c. Layering AI summarization on top of seller-entered notes, which is better, but you still only see what reps choose to log **3**
- d. Pulling clean, complete data automatically from ERP, email, calendar, and customer interactions, so the picture is built from signals, not seller memory **4**

Score:

A new person joins the team. In order to get them up to speed on customers you:

- a. Sit them next to the guy who's been here since the dawn of time to 'learn the ropes' **1**
- b. Make them watch a load of Loom videos on how to navigate the spreadsheets **2**
- c. Get them to dig around in the CRM for relevant information, and read the handover files left in there **3**
- d. Start them with the summary the CRM makes of each customer, and get them to ask the CRM any follow-up questions they might have **4**

Score:

A frontline sales manager has requested a tweak to how the CRM works. Does that mean:

- a. Picking apart a web of integrations, customizations, and 'temporary fixes' from seven years ago **1**
- b. Asking the one person who understands it to pry open the lid of the black box, taking a deep breath, and crossing every finger **2**
- c. Scoping the project, sprint planning, and preparing for a tidal wave of tickets **3**
- d. Making the changes, communicating the changes, moving on **4**

Score:

Did you know?

70% of companies struggle to integrate their sales plays into CRM (Bain & Company)



Total score so far:

**It's not you
IT'S THEM**

The compatibility spectrum

Tally up your total, and see where you sit on our compatibility spectrum:



We say this with nothing but love: you deserve better. Either you don't have a CRM, or you do and people aren't using it. The good news is, taking this test means you're already on the journey to a CRM that really meets your needs.

Hopefully you'll have seen the answers you weren't choosing and now know there are better solutions out there available to you.

This isn't bad, but it's not great. It is, however, very common. This is the sort of relationship where nobody is really getting what they need. Sellers put in more than they get out, leaders get visibility they can't really trust, Finance get something that's inexpensive but ineffective.

Stay in a relationship like this too long and resentments grow, data input gets worse due to the resentment, the CRM performs worse because of it, and the cycle continues. But you already knew that. That's why you're here.

Your CRM is a decent system of record, and your more proactive sellers can manage to use it to surface some valuable insights and close deals, but it doesn't do anything to help newbies know what to do next, or steer passionate middle-of-the-pack account managers on how to be excellent.

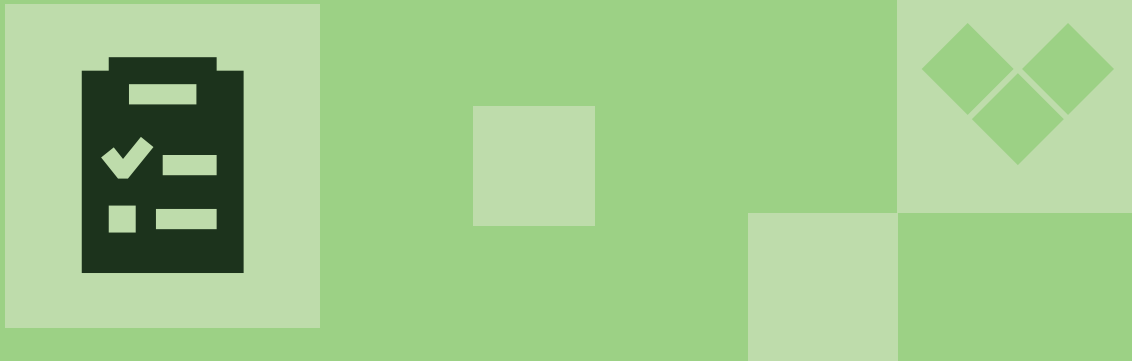
This is the sort of situation where you can trundle along forever. But if you're taking this test, you're probably hoping there's something better out there for you. There is.

You've got a CRM that acts as a system of guidance, helping your account managers to make precise next moves that drive revenue. The business can see the impact of the CRM, and the return on investment is obvious. Oh, and the business doesn't have to spend more time maintaining it than using it.

You've found yourself a keeper.

Not-so-fun fact

76% of CRM users said less than half of their organization's CRM data is accurate and complete (Validity)



What a good match with a CRM looks like in practice

21%
Revenue
growth



x11
Customer
base



+\$1M
Annual
benefit



+1100%
Pipeline
increase



If you want to find a CRM partner that's right for you, here are five essential questions you need to ask:

1

What % of your revenue comes from current customers – and does the CRM work for that model?

2

How much of your sales process happens in the field or on customer sites – and does the CRM have mobile capabilities that support that motion?

3

How do you currently identify upsell opportunities and identify issues in customer accounts – and does the CRM provide a better way to do this?

4

How do you calculate total CRM cost and return on that investment – from 'it comes free with another tool but doesn't meet our needs' to 'it costs a lot and has features we never use.'

5

What decisions do reps wish they could make faster – and does the CRM proactively guide action or reactively summarize what's already happened?



And if you want to see what a CRM that meets your needs looks like in action

book a demo of
SugarAI today



About SugarAI

SugarAI goes beyond traditional CRM to power account-first, AI-driven selling. We help sellers win and grow the accounts that matter most by uncovering hidden risk, revealing expansion opportunities, and guiding every next move for complex, relationship-driven businesses.

Learn more at www.sugarai.com

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