SugarAI

It's not you
IT'S THEM

COMPARISON GUIDE

How to pick a CRM that really meets your needs.

If you're contemplating starting a relationship with a CRM, we want to make sure you're partnering up with the one not just anyone.
In this guide we'll walk you through the important considerations you need to make before getting hitched (metaphorically of course) with a new CRM.

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1 Why most CRM buying advice fails you

We want to be very clear about who this guide is for. There is a lot of generic CRM advice out there – and a lot of generic CRMs for that matter.

This guide is specifically intended for businesses that operate in what we're calling 'the real economy'.

We're thinking about organizations with complex operations, high trust requirements, and limited tolerance for mistakes. Manufacturers, distributors, wholesalers, credit unions, aged care providers.

Companies that make real things, serve real people in real buildings; that close deals with car journeys and handshakes.

And importantly, companies where driving revenue comes from managing complex relationships. Whether that's selling to a current book of business, storing the information needed to navigate regulation, or orchestrating relationships with many stakeholders simultaneously.

Which brings us nicely to the main reason that most CRM advice fails you:

They're not built for you.

Most CRMs are designed for the SaaS sales motion. That means high-velocity, net-new logo acquisition, and then a high-margin subscription model. To be a little reductive, they sell one thing to as many people as possible.

It's a completely different motion to the businesses in the real economy. Your business depends on repeat orders, long-term accounts, and complex relationships. You may have hundreds of SKUs, hundreds of customers, or both.

For them, the biggest potential to grow revenue comes from outside. For you, it's about the customers you already know.

Which means when assessing a CRM, you need to reframe the goal.

Most CRM advice will be about tracking deals.

You need a CRM that helps to grow revenue from existing accounts, protect margin, and improve your operational efficiency so you don't let selling potential fall through the cracks.

2

Identify how your business actually grows

The way your organization creates value should shape the CRM you choose. Use the chart below as a jumping-off point to identify the factors that stimulate and stagnate your growth.

While getting these right is important, the name of the game here isn't total accuracy, it's more about identifying whether your business has need for a CRM that can execute a simple motion repeatedly, or a complex and varied one.

Revenue comes from:	Complexity factors:
Existing accounts (often 70–90%+)	Multi-contact buying groups
Repeat orders, renewals, reorders	Pricing agreements, contracts, volume tiers
Cross-sell / upsell across product lines	Channel partners, distributors, reps

Key takeaway:

If you sit on the complex, relationship-driven end of the spectrum then you don't need a pipeline tracker as much as you need a system of guidance that can consolidate data from sources like your ERP and identify issues and opportunities hiding in that data.

The hidden cost of choosing the wrong CRM

3

When looking at the impact of using the wrong CRM, it's easy to miss the wood for the trees, thinking only of the direct impact on sales. But an ineffective CRM affects many different departments.

Identifying which of these you're impacted by will not only help you choose the right CRM, it will also help with internal buy-in for the process of changing CRM. We're under no illusion about what an undertaking this is, and want to make it as straightforward as possible.

For sellers:

Duplication and fragmentation of work

- If the CRM doesn't do what reps need it to do, they'll find themselves working in spreadsheets alongside the CRM. This will often result in a doubling-up of data entry (which nobody likes) and data being spread across different places (making reporting much harder).

Missed issues and opportunities

- If a CRM only shows seller activity, you miss out on account-level signals like revenue trends and upsell opportunities. This means you can feel like you have a grasp on what's happening in an account, while they're actually slowly shifting their buying to a competitor.

For sales leaders:

Poor adoption

- Putting sellers into a position where they have to update and maintain a CRM, and get little to no value in return starts a vicious cycle: It doesn't help drive revenue, they resent using it, the data they enter is incomplete/inaccurate, it doesn't provide value. And the cycle starts again.

Margin leakage

- If your CRM doesn't show the full picture of your customer account, you can end up giving discounts where you shouldn't, or not claiming discounts where you should be.

For finance:

Paying the price of cheap

- Often a CRM (or a CRM-like tool) will come bundled with other tools so it seems like a good saving to not have to pay for another piece of software from another vendor. But if it doesn't meet your needs, the loss in revenue will often end up significantly outweighing the cost of the right CRM.

Bigger isn't always better

- On the other end of the spectrum, it's possible to buy the big name because it has a strong brand, but actually end up paying through the nose for hidden costs, implementations, customizations, other products required to get the functionality you need.

For IT:

Endless upkeep

- Choosing the wrong CRM (or trying to cobble something together to stand in for a CRM) often means a never-ending stream of tickets. Either because you need an admin every time someone wants to run a report, or just to maintain and manage the system.

For exec-level leadership:

Lack of visibility

- When you have incomplete data (lacking signal from places like ERP and email) and inaccurate data being entered, you only get a view of what's already happened, and can't accurately forecast.

The unfortunate fact is that without taking a step back and identifying these are CRM issues, it's entirely possible for all of them to look like symptoms of a team that's failing. Sellers that keep missing important signs and won't keep data up to date, conflict with an IT team pushing back on endless tickets, leadership that can't provide a clear roadmap.

But you know deep down that's not true. It's not you, it's your CRM.

4 The shift: From pipeline management to account intelligence

Before we dive into the exact capabilities you need to be looking out for, let's quickly refresh ourselves on the difference between what typically constitutes a good CRM, and what good looks like in the real economy.

Traditional CRM	Leads	→	Opportunities	→	Close
Real economy CRM	**Accounts**	→	**Relationships**	→	**Lifetime value**

Making this shift means improving quote to cash efficiency and protecting margin.

So, what does a CRM for the real economy look like?

It:

- **Shows account-level insights (not just deal level)**
- **Has embedded AI that provides guidance on what to do next**
- **Helps sellers prepare for customer interactions**
- **Surfaces issues and opportunities hiding in customer behavior**
- **Provides comprehensive relationship mapping**

Now, let's dig deeper into the features and capabilities you need to check for when kicking the tyres of a new CRM.

5 Core capabilities checklist

In this section we're going to talk about the capabilities you need if you're a business operating in the real economy, and provide the questions you need to ask to find out if a CRM that's courting you is a potential life partner, or just a peacock.

A. Account-centric data model

Can it:

- Aggregate all activity, orders, and interactions at the account level?
- Handle complex hierarchies (parent/child accounts, locations, divisions)?

Why it matters:

Your revenue lives in accounts, not isolated deals

B. Revenue intelligence (not just pipeline)

Does it:

- Incorporate historical orders + ERP data?
- Show trends: growth, decline, product mix, margin?
- And can it show these insights without the need for a separate BI tool or CDP?

Red flag:

If the CRM only shows "open opportunities"

C. Relationship mapping & multi-threading

Can you:

- Track multiple stakeholders per account?
- Understand influence, roles, and engagement?

Why it matters:

Deals stall when relationships are shallow

D. Reorder, renewal & expansion signals

Does it:

- Identify when a customer is due to reorder?
- Flag at-risk accounts?
- Suggest cross-sell opportunities?

Red flag:

This is where most CRMs fail outright

E. Workflow fit for field Sales & Account Managers

Is it:

- Mobile-friendly and usable on the road?
- Designed for **account management**, not just SDR/AE workflows?

Why it matters:

Adoption is a deciding factor

Integration with ERP / back-office systems

Can it:

- Pull in orders, invoices, inventory, pricing?

Why it matters:

Without it, you're flying blind on actual revenue

G. Embedded AI that drives action (not just reports)

Look for:

- AI that answers: "Which accounts should I focus on today – and why?"
- Recommendations, not just dashboards

Red flag:

The AI just does summaries. Call transcripts, customer information. All backwards facing.

Now that we know what we're looking for, let's take a quick look at the mistakes people make when assessing a new CRM. We want you to get to the end of this process without ever saying to yourself: 'Oh, I should have thought of X.'

Common CRM evaluation mistakes 6 (and how to avoid them)

We've seen many companies go through the assessment process, and helped lots pick up the pieces after making mistakes and ending up with a CRM that isn't right for them.

To help you make the right decision first time, we've put together some of the most common mistakes we see.

Not taking into account implementation/ customization time and cost:

- The cost of the CRM is not just the price on the tag. It's the time and effort it's going to take to get the CRM up and running, all systems connected (ERP integration being a vital one), and all people onboarded.
- Make sure as part of your conversation you ask about how long this will take, what it will cost, and how they will assist you. You'd be surprised how much the answer will vary from vendor to vendor.

Forgetting about the total cost of ownership:

- Once the CRM is up and running, there will be varying degrees of ongoing maintenance, depending on your choice.
- Make sure to ask about what resources will be needed internally to admin the system.

Getting distracted by the razzle-dazzle:

- This can take the form of being wowed by a big brand with Hollywood stars in their marketing campaigns, or a very polished user interface that covers up a lack of data depth under the hood.
- Make sure to document what your business needs are and logically work your way through them to make sure they are all met (and not exceeded with an exceeding large price tag).

Mixing up stakeholders and decisionmakers:

- Deciding on a new CRM is a major decision that affects many different departments. But letting IT or marketing drive the decision instead of revenue leaders, can mean the wrong partner gets chosen.
- Make sure to include all relevant parties, but make it clear from the off which participants are stakeholders and which are decisionmakers. It's very easy for people to pull rank in this situation, so get the ground rules set at the highest level to avoid any uncomfortable power struggles.

7 Your buyer's worksheet

Here we're going to provide a few questions for you to ask internally to assess your specific needs, then provide you with the space to assess vendors against those needs.

THE QUESTIONS.

- What % of revenue comes from existing customers?
- How do you currently identify upsell opportunities?
- Where does customer data live today?
- What decisions do reps wish they could make faster?
- How often are sellers working from the field?
- What does your sales process look like?
- Where is most of your sellers' time spent?
- What technology do sellers currently use to increase their capacity/efficiency?

VENDOR ASSESSMENT.

Once you have the answers to each of those questions, you can go into a conversation with a vendor able to pressure test their offer.

We suggest scoring against the following criteria:

- Account-centricity
- Revenue visibility
- Relationship intelligence
- AI usefulness
- Industry fit (manufacturing/ distribution complexity)

We'd also encourage you to ask for situation-based demos relevant to how your business operates:

- "Show me how a rep identifies an at-risk account"
- "Show me how to find the next best upsell"

2 Resetting expectations:

What good looks like

Many people have been in unsuccessful relationships with their CRM for such a long time they have lowered their expectations for what a CRM should be capable of.

If you've chosen the right CRM, a rep should log in and see accounts likely to reorder, accounts declining in spend, and recommended actions. Leadership should see true revenue forecast, not just pipeline, and account health across the base.

For companies in the real economy, dealing with complex, relationship-driven business growth, this type of CRM can help you grow revenue from existing accounts, protect margin, and improve your operational efficiency.

This type of CRM is a partner for life.

Want to find out if SugarAI could be that partner?

Book a demo today.

SugarAI

Unlock sales potential

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