

How to Choose the Right CRM: A Buyer's Guide That Actually Helps

Brought to you by Unmatched,
HubSpot Solutions Partner
(But this guide is CRM neutral - promise).



14 PAGES
20 MIN READ

Unmatched

Why this guide exists

There are a lot of CRM systems out there. Some are brilliant. Some are bloated. Others just aren't the right fit for your team. Are you moving away from a legacy system? Did you hit a ceiling with a basic setup? Or maybe you're finally ready to get rid of the spreadsheets and centralise your customer data once and for all?

Whatever stage you're at, one thing's clear: *choosing the right CRM is a big decision*. It affects how your team works, how your customers experience your business, and how you grow. The process can quickly get overwhelming - with big promises, buzzwords, and platforms that all sound the same.

That's why we created this guide: to give you straightforward, impartial advice to help cut through the noise, understand what actually matters, and make the right choice with confidence.

No jargon. No fluff. Just a clear path forward.

WHAT'S INSIDE

- 02** Why CRM matters now more than ever
- 04** Signs it's time to make a change
- 05** What to look for in the right-fit system
- 07-12** A practical, 6-step buyer's guide
- 13** What to do after you've made your choice

CRM: More Than Just a Database

A CRM isn't just a contact list or sales tool - it's the engine behind how you attract, win, and retain customers.

Done right, it gives your teams a shared view of your customer journey, helps you automate the manual stuff, surfaces valuable insights, and allows you to create standout experiences that drive real growth.

But not all CRMs are created equal. And choosing one isn't just a tech decision - it's a business decision. One that needs to work for your processes, your people, and your plans for the future.

In short, the right CRM makes growth manageable - not messy.

Think of it as the central nervous system of your business. It should:

- Help you understand and act on every stage of the customer journey
- Bring all your teams onto the same page
- Reduce the time spent on repetitive admin
- Give you confidence in your data and reporting
- Scale with you as your business grows

When is the right time to switch?

There's no universal rule - but there are some clear warning signs that your current setup might be holding you back. If any of these sound familiar, it might be time to explore a better-fit CRM:

01

YOUR DATA IS ALL OVER THE PLACE

Customer information is spread across spreadsheets, inboxes, disconnected platforms - or worse, people's heads. That makes it hard to get a clear picture and harder still to act on it.

02

YOUR TEAMS ARE WORKING IN SILOS

Sales use one system, marketing another, and support something else entirely. No one's working from the same source of truth, and it shows. Handoffs get missed, and the customer experience feels disjointed.

03

REPORTING TAKES TOO LONG - OR DOESN'T HAPPEN AT ALL

You're manually piecing together reports from different tools, or worse, flying blind. It's time-consuming, error-prone, and keeps your team guessing rather than acting with confidence.

04

YOU'VE SIMPLY OUTGROWN YOUR TOOLS

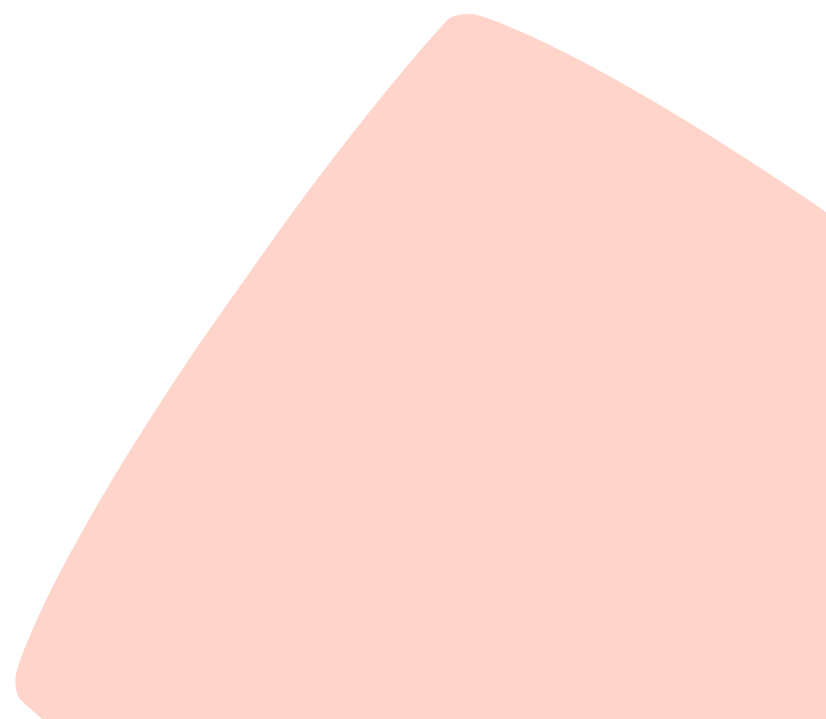
What worked when you were smaller now feels like a bottleneck. Things are clunky, slow, and don't give you the flexibility you need to grow. If you recognise any of the above, it's time to step back, reassess, and find a solution that fits where your business is going - not just where it's been.



BUYER'S GUIDE

We've worked with organisations of all shapes and sizes and we know every business operates differently. The CRM software you choose should support - not reshape - your unique way of working. That said, there are universal steps you can take to navigate the buying process with confidence.

This six-step guide is designed to help you make an informed, practical decision that works for your people, your processes, and your plans for growth - choosing a CRM that supports real-world needs - not just ticking boxes on a feature sheet.



Step 1: Consult with Stakeholders & Key Users

Before getting into features, pricing, or integrations, take a step back and speak to the people who will be using the CRM every day.

This includes your sales, marketing, and service teams, as well as operational and technical leads. Each team has their own way of working, their own pain points, and their own wish list. The most successful CRM projects start with empathy - understanding exactly what your teams need to do their jobs better.

Map out the day-to-day workflows that matter most. How are leads captured and followed up? Where does customer data live now? What tools do teams use to communicate or report? You may find gaps you didn't know existed.

Bringing these conversations together helps you spot themes. Are there common frustrations? Do teams struggle to get the information they need when they need it? What kind of improvements would move the needle for each department? With a clearer picture of team priorities, you can build out an internal checklist of requirements - aligned to real-world needs rather than assumptions.

INSIGHT

Tip: Create a cross-functional focus group to keep conversations open and collaborative throughout the process.

Step 2: Identify Your Goals

A CRM shouldn't be a fix-all - but it should move you closer to your core business goals. This is the moment to define what success looks like.

Think in terms of outcomes, not just tools. Are you trying to accelerate sales velocity? Improve customer retention? Streamline how teams report on pipeline and performance? Be specific.

Include a mix of short-term goals (what needs to improve right now?) and longer-term objectives (where do you want to be in 12-24 months?). Think about how you'll measure progress - whether that's faster handoffs, clearer dashboards, or fewer lost leads.

You should also consider what's missing today. Are there manual processes holding your teams back? Do you have enough visibility into the customer journey? What metrics are hard to track - or completely absent?

Once you've clarified your goals, align them to system functionality. For example, if better forecasting is a priority, your CRM needs robust, customisable reporting. If you're looking to automate lead nurturing, powerful workflow automation is a must.

By grounding your shopping list in outcomes rather than features, you're far more likely to choose a CRM that delivers real value - not just one that looks good on paper.



Step 3: Assess Your Tech Stack

Before you get too deep into comparisons, pause to audit your existing technology stack.

This step helps you understand what tools your new CRM will need to connect with - and where it might be able to replace or streamline things. Are you juggling too many disconnected tools? Could a more capable CRM consolidate your setup?

Work closely with your IT or operations team to understand:

- ✓ **What current systems or platforms need to be integrated (e.g. email marketing tools, ticketing systems, finance software)**
- ✓ **Whether your data is clean, structured, and ready to move**
- ✓ **What kind of data sync or transfer capabilities are needed**

If your business operates across multiple systems (like using one tool for marketing and another for sales), ensure your CRM can handle integrations smoothly - or better yet, unify those functions altogether.

A CRM that integrates well with your existing stack will reduce friction and ensure a smoother rollout. One that replaces legacy tools can create cost savings and tighter alignment.



INSIGHT

Tip: Document any known integration risks and create a mitigation plan ahead of implementation to avoid surprises.

Step 4: Compare Critical Features and Capabilities

This is where the market can get overwhelming. Every CRM has a long list of features. The challenge is filtering what truly matters based on your earlier conversations.

Not all features carry equal weight. Use your goals and stakeholder input to rank priorities and identify non-negotiables. While specific needs will vary, the following capabilities tend to have the biggest impact:

✓ **REPORTS AND DASHBOARDS**

Look for easy-to-build, flexible reporting. Can your teams create dashboards tailored to their KPIs? Will they be able to slice data by lifecycle stage, source, owner, or custom fields? Are reports intuitive enough for non-technical users?

✓ **DATA QUALITY MANAGEMENT**

Your CRM is only as good as the data inside it. Explore how each system handles duplicates, formatting, validation, and hygiene. Can data be cleaned and updated automatically? Can it consolidate information from multiple sources?

✓ **CUSTOM OBJECTS AND FIELDS**

No two businesses track data the same way. Choose a CRM that allows you to create and manage custom fields - or full custom objects - so you're not forced into a one-size-fits-all structure.

✓ **AUTOMATION AND WORKFLOWS**

Good automation reduces manual effort and improves consistency. Can you automate tasks like lead assignments, email sends, pipeline updates, or ticket escalations? Look for flexible workflows that don't require heavy development.

✓ **INTEGRATIONS AND EXTENSIBILITY**

Most businesses don't run everything from one system. Make sure your CRM supports fast, low-maintenance integrations with the tools you already use - or plan to use in future. Open APIs, app marketplaces, or native integrations can make or break adoption.

✓ **SUPPORT AND SCALABILITY**

You'll need support - not just during onboarding, but as your CRM evolves. Understand what's included: live chat, onboarding services, knowledge bases, or access to account managers. Also, check if the platform will scale as your team and data grow.

Step 5: Consider Costs and ROI

Pricing varies widely across the CRM landscape. What looks affordable at first glance may become costly when you factor in add-ons, users, integrations, or support.

That's why it's critical to weigh total cost of ownership against the long-term value your CRM will deliver. Start by breaking down:

- ✓ **Core platform cost (per user, per month)**
- ✓ **Any additional modules or feature bundles**
- ✓ **Training, implementation, or onboarding support**
- ✓ **Maintenance or scaling costs over time**

Now match those costs against what you stand to gain. How much time could automation save your team? What's the value of cleaner reporting or better pipeline visibility? Could you retire multiple tools and save on subscriptions?

Also, consider scalability. A cheaper CRM might meet your needs today - but if you outgrow it quickly, the cost (and disruption) of migrating again can outweigh early savings. Prioritise systems built to grow with your business, even if the initial investment is higher. Think of it not just as a software purchase, but as a strategic foundation for how you plan to operate and scale.

It's also worth considering the hidden costs. Will your team need external consultants to implement and manage the platform? How long will onboarding take? How much training is included - and how much will you need to handle internally? A good CRM provider should be transparent about these realities and provide clear guidance on getting up and running successfully.

Bringing your finance and leadership teams into this part of the conversation early will help you build a realistic view of ROI and secure the buy-in you need to move forward confidently.

Step 6: Plan Your Implementation & Rollout

Selecting the right CRM is only half the journey. Without a considered implementation plan, even the best platforms can fall flat. Now's the time to get strategic about how you'll bring your chosen system to life inside your business.

Start by assigning ownership.

Who will be responsible for project managing the rollout? Do you have the internal resource to lead configuration and training, or will you need external support? Implementation can range from simple and self-led to complex and consultant-driven depending on the system and your setup.

Next, map out a timeline that includes configuration, testing, team onboarding, and go-live. Build in breathing room for unexpected delays - especially if data migration or integrations are involved. You'll want time for quality assurance and user testing to catch any friction before it hits your frontline teams.

Then, plan for adoption. A CRM only works if people use it. How will you train your team? What support will be available post-launch? Will you roll out in phases or go live all at once? Consider change management: how will you communicate the benefits and get everyone on board?

Finally, look beyond the first few weeks. Your CRM will evolve with your business. Set clear checkpoints at 30, 60, and 90 days to review usage, iron out issues, and gather team feedback. CRM success isn't just about implementation - it's about creating lasting habits and continuously optimising how your tools support your work.



What's Next?

Choosing a CRM isn't about finding the most popular platform. It's about finding the system that's right for *your* business - today, and tomorrow.

That means one that:

- ✓ **Supports the way your teams already work**
- ✓ **Gives you room to grow, change, and scale**
- ✓ **Makes your customer journey feel seamless**
- ✓ **Unlocks meaningful insights that drive smarter decisions**

If you've followed this guide, you now have a clear understanding of what to look for, how to evaluate your options, and how to set yourself up for success beyond the purchase.

Get in touch

unmatched.agency
hello@unmatched.agency



0203 9106 686

Need a sounding board before you decide?

We help businesses like yours choose, implement, and get the most from the right-fit CRM. If you want to sense-check your shortlist or get an honest, jargon-free opinion, we're here to help.

👉 Talk to Unmatched

Unmatched

