

# Workbooks CRM Study: More than half of British small and medium businesses have changed CRM supplier

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Thursday, 7 November 2019

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More than half of small and medium enterprises (SMEs) in the UK have changed customer relationship management (CRM) supplier according to the State of the CRM Market 2019 Report (<https://www.workbooks.com/resource-documents/the-state-of-the-crm-market-2019-industry-report/>) from Workbooks (<http://www.workbooks.com>). The company also found that a quarter of SMEs have yet to be persuaded of the benefits of CRM and have not yet bought any system at all.

The research found that the main reason for changing supplier was a poor fit in terms of the business requirements – 48% of respondents thought this was a problem. “The responses show that there is much to consider when looking at CRM including business strategy, technology, budget, change management etc,” explains John Cheney, CEO and Founder of Workbooks. “A CRM project requires a focus on technology, people and processes; only when all three are in harmony will you truly maximise your ROI.”

Related to this were the 38% of businesses who thought that their chosen CRM system was not able to scale according to their needs. The issue of cost was a less significant factor with 28% of respondents having changed CRM software because the cost was too high, the same proportion that switched because their choice didn't integrate with other business applications.

There were some concerns around cost, however. The Workbooks survey revealed that SMEs found it difficult to ascertain the return on investment of their CRM applications: three-quarters of British companies surveyed found it impossible to quantify the value of their CRM investment. US companies found it even more difficult: 85% of them couldn't accurately calculate their ROI.

“Very often companies find it difficult to measure ROI as CRM allows them to do things they never could before. There is no baseline to compare activity against,” explains John Cheney. “Companies can see it has made the business better, but find it difficult to quantify. While it is great that so many SMEs appreciate what CRM brings to their organisations, there does need to be more work to ascertain this value.”

There was widespread appreciation of the benefits of CRM: even among those companies who had not chosen a CRM system at all, 46% said that they intended to at some time in the future. Reasons for not adopting CRM included the belief that it would not be an effective way to manage customers and failure to provide value for money.

Other key findings include:

- The primary motivation to implement a CRM platform remains improving productivity of customer facing staff (53%). This is followed by attracting and acquiring new customers (49%), keeping and retaining existing ones (47%), and improving customer experience (42%).
- Features and functions and the ability to integrate with other applications remain the most important considerations by far at 71% and 58% respectively. Integrating with a marketing automation platform remains a key concern (84%), followed by integrating with the company website for lead generation

purposes (55%), while 44% expected it to integrate with their quotes, finance, accounting, and order processing systems.

- Key functionalities required are contact management (75%) and pipeline management and forecasting (57%). Analytics and reporting comes in third position at 43%. Artificial Intelligence functionality was mentioned by only 4% of respondents.

- Data migration is the number one obstacle to CRM implementation (44%). Other concerns such as the availability of resources to get things done alongside the day job, or resistance to change among users were mentioned. Only one in ten pointed to a lack of buy-in from leadership or an inability to see the value of CRM as obstacles to overcome.

- Nearly half of all UK respondents said that GDPR has had an impact in the way they deal with data. Some have introduced procedures and policies around data collection, data ageing and data removal, security measures and so on. Others have set up secure portals to communicate with customers and partners or have moved to an opt-in model. Staff have also been trained around the proper handling of data. Many have leveraged their CRM platform to underpin their GDPR processes and procedures and track the required compliance information.

“Supercharging the adoption of CRM is an important element to the digital transformation of all industries and sectors and key to increasing overall productivity and economic growth across the UK. The good news is there continues to be a steady flow of organisations beginning to recognise the value of CRM. However, many that still have not. We must do more to promote the positive benefits and opportunities of CRM technologies while also continuing to identify and overcome remaining concerns and barriers to adoption, such as data migration and user resistance.” concludes Katherine Mayes, Programme Manager, TECHUK.

A webinar to discuss the findings of the report will take place at 11am on November 21st, 2019. For more information and to register, click here

(<https://www.workbooks.com/event/crm-state-of-the-market-survey-findings/>).

To download the State of the CRM Market 2019 Report, click here

(<https://www.workbooks.com/resource-documents/the-state-of-the-crm-market-2019-industry-report/>).

#### About Workbooks

Workbooks offers growing companies a SaaS platform to run their business and engage effectively with their customers - at an affordable price. Its core CRM services extend beyond sales, marketing and customer services to include powerful marketing automation, order management and fulfilment, invoicing and supplier management functionalities - at a price which is typically 50-70% less than the alternatives.

Workbooks unites the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360-degree view of customers and the information is accessible anytime, anywhere. Productivity and revenue increase, operations are streamlined, insightful decisions made and the business is better equipped to differentiate against its competition.

For more information, visit [www.workbooks.com](http://www.workbooks.com) (<http://www.workbooks.com>)

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