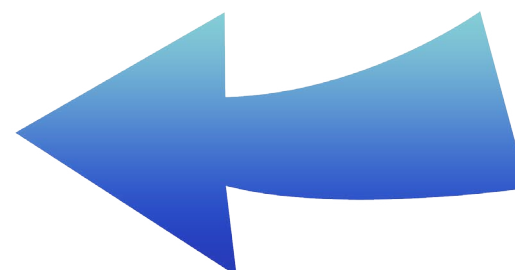# Maximizer Software
Simply Successful **CRM** ™

Cloud or On-premise
Discover your best option

Step 1 : Define the 'must haves' of your CRM

Selecting the right CRM for your business can be an immense responsibility, often complicated by the range of functionalities available, the number of solution providers and now the additional choice of whether to host your CRM on-premise (within your office on your own IT infrastructure) or in the cloud (application is held on an external third party server and is accessed via the web).

Before embarking on your quest, let Maximizer Software explain the key differences between on-premise and cloud deployment options, providing you with this interactive tool to help you find the best solution for your business.

Instructions:
Tick which criteria below you think your CRM simply cannot do without:

Easy to use contact management	Data held on your company's server
Simple user interface	Data managed securely, no expensive infrastructure
Easy access for all staff	Low monthly costs
Flexibility to scale the number of users	Full-featured CRM: lead/opportunity, customer service management

Step 2 : **Your company**

The size of your company and the sector of business it operates in will affect the solution you choose.

Instructions:

Review the questions below and score each deployment type based on which answers suit you best.

Questions	Cloud	On-premise
Company **Are you a startup company or rapidly expanding organisation?**	**'Yes, my company is a startup or is undergoing rapid growth'** Cloud CRM is great for organisations who just want an easy way to setup and access their CRM system with low upfront investment and expenditure. Due to these benefits, this option is popular, but is certainly not limited to startup and high growth companies.	**'No, my company is a well established organisation with a large infrastructure'** On-premise CRM allows organisations to acquire a system which can be integrated and customised to uniquely fit their organisation. As these are commonly the needs of an organisation that has been in operation for some time, on-premise is a popular choice, though there are also many instances of cloud based CRM systems being very successful for vast multi-national corporations.
Are you in a specialist industrial sector?	**'No, we do not have any specialised needs'** If you do not require extensive customisation and integration with industry specific software, a cloud based CRM is the most apt choice, as it simply works out-of-the-box.	**'Yes, we operate in specific and specialised areas of industry'** If you are in the financial, construction, medical or any other specialist sector, you may well have software applications which are vital to you and therefore must integrate with your CRM seamlessly. On-premise CRM allows you to customise your system to integrate with other software, empowering you to provide your staff with a CRM system which truly fits their role.

How many answers were right for you?

Step 3 : The security of your data

There is no question that you will want your data to be secure, but you may have certain requirements, some of which may be legally obligated, that will heavily affect your choice of system.

Instructions:
Review the questions below and score each deployment type, based on which answers suit you best.

Questions	Cloud	On-premise
Security		
Do you require your own dedicated server to host your data?	*'No, I don't mind sharing server space with other companies'* By sharing a server, the cost of your CRM will be much lower and you will still get peace-of-mind that your data is secure and can only be accessed by you and your business. However, your ability to customise or add other applications to your CRM will be limited if you're sharing a server, though most top CRM providers will give you the choice to have your own dedicated server as part of a hosted offering if required.	*'Yes, I need my data to be hosted on a dedicated server'* If you want complete control over your data you may need an on-premise solution, where your data is housed on your own server; therefore you will need the required IT infrastructure and staff resources to manage your data, which will drive up costs. As many providers offer dedicated server options, cloud could still be an option
Would you like to build in additional security?	*'No, I'm happy with what I am provided with'* All established CRM providers ensure their cloud based options are highly secure and if you don't house highly sensitive data, it may be an unneccessary precaution to build in extra security.	*'Yes, I'd like to add my own security'* If you use highly confidential data, such as financial or medical details, and/or you want to access your CRM via various methods, then you may want to add your own extra security to ensure the safe keeping of data. However, this may require costly customisation.
Do you need access to your backup data file?	*'No, I am happy for back-up data to be held off site'* If you are happy to have your backup data managed by your CRM provider, then cloud is a good choice; again, it keeps costs down and allows companies without a technical team to be covered should the worst happen. Top CRM providers are flexible in terms of letting you access your backup data, but be sure you fully investigate the backup process when selecting a provider.	*'Yes, I need regular access to my CRM's backup data'* On-premise is the automatic choice for companies who wish to backup their data themselves, giving you ultimate control over the data storage, but in doing so, it also drives up costs, due to the extensive hardware and in-house technical expertise needed to carry this task out competently.
Do you have a legal requirement to store data at a certain location (country, for example)?	*'No, I have no legal requirement'* If you are not dealing with highly sensitive data, then you are probably not required by law to store your data on-premise and therefore a cloud option is available to you. In some countries, you must store your data on-premise, regardless of content, within the country itself. Cloud CRM can still be provided in this instance if your CRM provider has a global network of Partners.	*'Yes, I have legal requirements on my choice of data storage'* Some countries require by law that data must be stored on-site or locally. On-premise CRM can fulfil these requirements and if you do have strict legalities surrounding your data, this may be your only realistic choice of CRM.

How many answers were right for you?

Step 4 : Your existing infrastructure

Whether you want to make the most out of the infrastructure you have in order to get the best return on investment or ensure you don't make the mistake of being tied to a system which you simply don't have the capacity to maintain, you have to think carefully about which deployment would suit your existing resources.

Instructions:
Review the questions below and score each deployment type based on which answers suit you best.

Questions	Cloud	On-premise
Do you have your own internal IT administration department?	*'No, I am part of a small company with no specific IT department'* Cloud is your best option here, as it takes the technical headache away and replaces it with a system that just works without the added hassle of having to administrate it.	*'Yes, we have are own IT department and/or we are IT professionals'* If you have technical training or have an internal IT team then you certainly have the ability to opt for the on-premise CRM option. Resources and hardware will be required to implement and maintain the system, but it will allow you to have far more control over your data and the customisation of your CRM.
Do you have the capacity to host your own CRM system?	*'No, we don't have the necessary hardware in-house'* If you don't have your own servers, then you won't be able to implement on-premise CRM without first incurring high hardware investment costs. With cloud CRM, you can bypass this problem by simply paying for space or the full use of your CRM providers' servers. This gives you the added bonus of always having the best hardware possible: increasing the speed and reliability of your CRM system.	*'Yes, we have all the hardware required to host our own CRM system'* If you have all the hardware you need and maybe even have server space going spare, then on-premise can save you money in the long term, by making use of resources you already have. However, the responsibility for keeping the hardware in good condition and managing regular upgrades relies on you.
Would you like to reduce your existing infrastructure?	*'Yes, I'd like to cut my overheads and streamline my business'* Some companies are making vast savings by moving their IT infrastructure to the cloud, including their CRM. It's worth considering that the top CRM providers such as Maximizer allow you to group various IT resources and applications on one server, not just CRM.	*'No, the infrastructure I have in place is needed'* If you have need for your infrastructure then you can capitialise on its running costs by using an on-premise CRM system.

Existing Infrastructure

How many answers were right for you?

Step 5 : Your need for flexibility

Before choosing a deployment type, you must consider how flexible your CRM will need to be to meet and keep on meeting your company's needs.

Instructions:

Review the questions below and score each deployment type based on which answers suit you best.

Questions	Cloud	On-premise
Would you like to be able to change the amount of users accessing your CRM on a regular basis?	**'Yes, I want the amount of users to change as frequently as possible, to manage my seasonal workforce'** Cloud CRM is very flexible in terms of how many users have access to the system and with cloud CRM you can scale up or down monthly, depending on your requirements. This allows your CRM to scale with your business if you require such flexibility.	**'No, my number of users is set and is unlikely to change'** On-premise has limited flexibility and once you have bought and implemented the licences, you will be able to downscale and you will be able to purchase addictional licences if required. However, the speed in which you can upscale to make the CRM available to more users can be quite slow, as it needs to be implemented which can take anything from a few days to weeks.
Do you need to be able to add selected functions, should you need them?	**'Yes, I want to be able to add new functions as and when I need to'** Similar to the scalability with users, cloud CRM offers you the ability to select which functions you want to include and pay for. This allows companies who change their mode of operation or business process on a frequent basis an extremely flexible CRM system to change them.	**'No, I'm happy to stick with the functionality I've chosen'** Again, on-premise is quite rigid when it comes to changing functionality as you pay a packaged licence and training. Most CRM vendors will be happy to provide add-on software to increase the functionality, but this may take some technical know-how when it comes to installing at an additional cost.
Do you have specific software which your CRM must integrate with, other than Microsoft Outlook and Office?	**'No, I just need integration with Microsoft Office'** With cloud CRM you will benefit from full integration with Microsoft Office applications.	**'Yes, I need my CRM to integrate perfectly with the specific software package we already use'** On-premise gives you the ability to customise your CRM system to integrate with almost any other software application. Be careful to select a CRM that is built on a flexible platform, which makes integration simple, and beware of spiralling integration fees.

(Left vertical label: Flexibility)

How many answers were right for you?

Step 6 : The accessibility of your CRM

With technology marching forward, making the world of business ever more mobile, you will need to consider your company's need for versatile access options, which can make a real difference to deployment type.

Instructions:
Review the questions below and score each deployment type based on which answers suit you best.

Questions		Cloud	On-premise
Accessibility	**Would you like to be able to access your CRM system wherever you are, via mobile, tablet, in the office or on the road?**	**'Yes, I need extremely flexible access'** Cloud CRM is accessed via the internet, therefore you can access your CRM via any device with internet (wifi) capabilities, including smartphones and tablets. Be careful to choose a CRM provider who has taken the time to develop a mobile interface, as many offer mobile access but limited functionality. Always request a mobile or tablet demo.	**'Yes, I need to access my system wherever I am'** On-premise can also be easily setup with a web portal, accessible via the internet on various web enabled devices, such as laptops, smartphones and tablets. However, be aware that some CRM software providers may charge extra for this standard implementation.
	Would you like to setup multiple databases for different users to work from?	**'No, I want to keep my data in one place'** Cloud usually only allows for one database to be deployed per user, making it unfeasible to have a test database or a database containing protected data, accessible by limited users. The need for multiple databases is rare, as security can be applied to certain records with most cloud CRM packages.	**'Yes I need more than one database'** If you require a database to house certain records or want a test database to see how a new update or customisation will function without harming your existing data, then you are more suited to on-premise CRM. Most on-premise CRM solutions will allow you to create various databases, though it may take extra work or cost to enable these databases to be accessed via the web.

How many answers were right for you?

Step 7 : The cost

Cost is undeniably one of the major factors in any business investment and budgets have never been tighter. Depending on deployment type, you can save on intitial investment to get up and running with minimal cost, or plan to make longer term savings with a higher short term investment.

Instructions:

Review the questions below and score each deployment type based on which answers suit you best.

	Questions	Cloud	On-premise
Cost	**Which option fits your budget?**	*'Around £20-£40 per user per month'*	*'A large initial investment with longer term savings'*
	Are you concerned with a significant initial investment?	*'Yes, I want a low cost way to get up and running with a CRM system'* Cloud offers the inexpensive deployment option with low cost monthly payments, no initial infrastructure and resource investment and no on-going service release updates. Though you may end up paying more in the long term in comparison to on-premise CRM solutions, you will always have an updated package of software.	*'No, I have a reasonable budget set for this year for CRM investment'* Though the on-premise CRM deployment option may seem initially expensive, if you have existing infrastructure and a high number of users, on-premise with Software Assurance for low cost upgrades may save you money in comparison to cloud CRM, in the long term. In addition if you have a budget to invest in the short term but a fixed annual amount, on-premise may be the best option.
	Would you prefer to pay for implementation?	*'No, I want to keep initial costs down to a minimum'* With no sizeable implementation fee, most cloud CRM solutions allow you to start benefiting almost immediately for just your monthly fee.	*'Yes, I don't mind incurring the initial cost if I own the software'* Implementation of the on-premise CRM software can be lengthy and costly, however you will own the software once the process is complete and can therefore tailor it more to your company's needs.

How many answers were right for you?

Results

	Cloud	On-premise
Company		
Security		
Existing Infrastructure		
Flexibility		
Accessibility		
Cost		

Calculate total!

Next Steps

Print

Send a copy

Save a copy

Next Steps

Cloud CRM solution your best deployment option?
Request a 1-2-1 demonstration with a Maximizer technical consultant.

On-premise CRM solution your best deployment option?
Take a test drive of Maximizer CRM on-premise.

Chosen your deployment option and now wish to compare CRM providers?
Download our Matchmaker tool to assist.

Would you like to know more about CRM?
Contact our friendly team and they'll be happy to help you find the best CRM solution for your needs:
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