

# A playbook for CRM modernization

How to navigate investments, avoid pitfalls  
and maximize system outcomes



**WIPFLI**

# It's time to look under the hood

**Customer relationship management (CRM) software has been a usual suspect on the list of top digital products for years. Today, the market for these solutions is strong, with a 10.17% annual growth rate expected from 2025 to 2029.**

Despite steady demand, Wipfli has observed two trends:

1. Certain industries are still hesitant to embrace CRM capabilities, and leaders in those industries continue to rely on spreadsheets and other manual business processes to drive sales and marketing.
2. Many organizations that have invested in a modern CRM are not always using it to its full capacity, or they're creating overly complex systems — all prime culprits of technical debt.

For any business consumed with sales and customer service, a CRM has the power to help close deals faster, deliver personalized customer experiences and automate processes between sales, marketing and delivery. So, whether an organization has an existing CRM solution or is just getting started, what's getting in the way of meaningful progress? And how can the latest platform features, particularly AI, make CRMs more accessible, customized and productive than before?

In this e-book, we look under the hood, exploring the key indicators of CRM success and the instrumental actions that business and IT leaders should take along the way.

## Common tipping points for CRM investment

- Sales teams can't keep up with lead flow and are losing revenue.
- Logging phone calls and email campaigns has become cumbersome.
- Customer data is disorganized, inaccurate or hard to find.
- It's hard to tie customers to campaigns or other activities in the organization.
- The sales process or pipeline isn't transparent enough.
- Reporting takes too much time.



# Examining CRM technology today

## Innovative features improve speed and value

A surprisingly large percentage of organizations pursuing CRM capabilities do not give sufficient thought to defining business objectives that drive the need for modernization.

Without a well-configured CRM, legacy practices can put an organization at risk:

- Teams don't hand off information or take actions at the right moments in time.
- Employees grow frustrated that they lack basic tools for a modern workplace.
- Sales pipelines become inefficient and can't scale or personalize customer experiences.
- Strategic decisions are made without the full context of information.

For everyone from the executive team to leaders in marketing and sales, CRM software can modernize the full enterprise experience, serving as a unified platform to collaborate internally, manage revenue, make decisions about performance and engage with customers.

**At a high level, enterprise benefits include:**

**Centralized customer data**

A CRM can provide a single, 360-degree view of customers, consolidating data on interactions, preferences, purchase history and support cases. This enables personalized engagement, improving customer satisfaction and loyalty.

**Marketing automation**

Many modern systems facilitate targeted customer campaigns, lead nurturing and customer journey mapping, aligning marketing efforts with sales goals for better conversion rates.

**Sales efficiency**

Organizations can automate tasks such as lead management, opportunity tracking and forecasting. This reduces manual work, speeds up sales cycles and helps sales teams focus on closing deals.

**Data-driven operations**

With relevant data flowing through the CRM, leaders have access to actionable insights, predictive analytics and trusted reporting. AI capabilities built into the CRM, from basic to more advanced options, help businesses identify trends, refine strategies and make smarter decisions.

**Revenue and productivity**

By optimizing sales, marketing and service processes, a CRM helps businesses increase win rates, retain customers and foster a culture of team collaboration and productivity.



## The same technology, with entirely new possibilities

CRM technology is far from a novel concept. So, what's next for users?

While the primary goals and benefits of a CRM haven't changed much over the years, the tools, features and capabilities are relentlessly evolving. Today, customers have access to a new generation of CRM platforms that integrate generative AI, autonomous agents that operate 24/7, powerful extensions with third-party applications and industry customizations so that a platform can target business challenges with precision.

At Wipfli, generative and agentic AI within the CRM is making it possible to help organizations do more, including:

- Automate proposals and summarize RFPs.
- Qualify leads and personalize customer communications.
- Tailor employee onboarding and assess performance.
- Maximize focus on personal contact while minimizing data entry time.

Today, organizations have transformative functions that can scale and fast-track their marketing and sales operations — right at their fingertips. But modern CRM integrations come with many more missed opportunities than before. Missed chances to identify high-value use cases that harness the latest features; to give staff the information and training they need to succeed; or to properly sync the CRM between datasets, systems and people. Ultimately, it's extremely easy to leave automation on the table.

So, how can an organization make the most out of their CRM today? The first step to high-value adoption is learning about the frequent barriers and roadblocks that stand in the way of success.



**29%**  
of time spent  
on sales can be  
automated.



# Where CRM integrations go sideways

## 10 red flags to anticipate and avoid

A CRM platform is just like any other tool or technology — on its own, it won't solve business challenges or create off-the-shelf value for employees. When organizations rely too much on their CRM product out of the box, they can lose sight of the technical and non-technical activities (beyond plugging in the tool) that keep their CRM integration on track and set them up for long-term success.

In general, there are foundational issues that can make or break a CRM integration: Did you pick a product that fits well in your IT environment? Are security protocols and policies codified in the system? Is now the best time, culturally and financially, to invest in a new enterprise system?

Investing in a CRM that doesn't live up to basic expectations can create a costly headache for an organization and put a strain on its workforce. But beyond foundational requirements, there are 10 avoidable red flags to anticipate along the journey. Each of them on their own can derail the trajectory of a CRM implementation and stand in the way of intended outcomes.

## 1. There isn't a clear 'why' to guide the project

A surprisingly large percentage of organizations pursuing CRM capabilities do not give sufficient thought to defining business objectives that drive the need for modernization.

Before embarking on a CRM project or even thinking about specific products, make sure to set the intention for the entire effort. That way, a CRM can support what matters most to your business, whether that's improving lead conversion, increasing retention or tracking customer relationships. If your business is not clear on the "why," a CRM can easily become just a fancy contact list — a difficult investment to justify down the road.

**To illustrate, business objectives include:**

- "We need to improve marketing ROI by segmenting our customers and developing more effective campaigns."
- "Sales managers need better activity information to make informed decisions about improving sales effectiveness."
- "We need a way to scale customer engagement. Our administrator should not be the company Rolodex."

## 2. Old assumptions creep into the current implementation

Very often, past experiences of implementing legacy CRM platforms can create internal tension and set up new projects to fail — before they even break ground.

One of the major blockers of success is the stickiness of "bad" experiences from years past in present memory. Negative experiences can get wedged in the collective memory of an organization and can lead to friction and resistance from key stakeholders. When a project is plagued by outdated assumptions and hard-to-change perceptions, transformation is an uphill climb.

**For example, common challenges from the past include:**

- "I remember when it took forever to build and implement our old system."
- "The last time we tried this, nobody on the team used it."
- "It was impossible to measure the ROI and make a case for the investment."

## 3. There are hidden or unexpected costs after go-live

Nobody likes a surprise when it comes to budgets. Inaccurate projections of CRM pricing at the start will guarantee downstream frustration and strategic misalignment.

Depending on what your organization needs to accomplish through its CRM implementations, costs can swing widely based on size, scale and complexity. That said, the sticker price for a product is just part of the story, and the total cost of ownership can surprise teams if they don't factor in and plan for the full investment. A robust understanding of pricing is especially true today as more CRM platforms move to a consumption-based pricing model and away from licenses per seat.

**Here are few line items that can (but shouldn't) take your implementation team by surprise:**

- Setup
- Training
- Usage
- Customizations
- Integrations
- Ongoing support and maintenance

## 4. Tech stack integration is an afterthought

If there are tools used for finance, marketing or operations, a CRM should connect with those seamlessly. Otherwise, it will create more silos instead of breaking them down.

Successful CRM implementation requires thinking about how the system fits into the bigger picture. Integration across the tech stack is key for data accuracy and workflow efficiency. If a CRM is bolted on after the fact or struggles to connect with relevant tools and IT services, businesses will struggle with manual dot-connecting, inconvenient gaps in reporting and a more difficult road to user adoption.

**The following are common tools that can integrate with a CRM:**

- Enterprise resource planning (ERP) systems
- Marketing automation services
- Customer service platforms
- Collaboration tools

## 5. There are never-ending issues with source data

A CRM is only as smart as the data that feeds into it. If a team constantly needs to untangle messy data, then the reports and automations in the CRM won't be reliable.

One of the primary goals of a CRM is to deliver intelligence about customers in the pipeline and overall business performance. Leaders need real-time insights that they can trust to make decisions and pivot as needed. If reports are delayed, difficult to produce, or inconsistent, that's a signal your system isn't doing its job.

**Here are some indicators that ineffective data management is getting in the way of CRM success:**

- Account duplicates
- Missing information
- Outdated records
- Inconsistent reporting





## 6. System adoption and usage are in decline

Low adoption, clunky user experience and frustration with reporting tools are all red flags. If your teams are using spreadsheets or side tools to avoid the CRM, it's time to reevaluate.

One of the most common reasons CRM projects fail is because users don't adequately adopt the system. When adoption and change management aren't prioritized as constant efforts, frustration and avoidance set in. Poor adoption can happen even with the best CRMs on the market. Users must understand the business objectives for the CRM and ultimately what's in it for them. That said, leaders need to devote ample resources for onboarding and ongoing training while building a mechanism for continuous user feedback to spot adoption or productivity issues in real time.

**With understanding and adequate training, users can pinpoint their own "why," such as:**

- "The CRM will make my life easier."
- "I'll be able to spend less time on admin and more time on the work I was hired to do."
- "Our team will have more accurate information to draw on to make decisions."

## 7. The first-stage implementation is overly ambitious

While full-scale CRM functionality is appealing, an attempt to do everything at once can introduce complexity at the start and overwhelm early users when the stakes are high.

A CRM is a meaningful investment, and it's smart to take the implementation one step at a time. Sure, you can drive the Lamborghini with all its bells and whistles out of the lot — but over-customization can lead to cluttered systems, reducing usability and efficiency.

There's wisdom in starting small with the bare minimum, testing features, measuring performance and then turning on more sophisticated CRM functions over time. Simplicity drives success and adoption, by giving users just what they need until they start to want more.

**Here are examples of features that can be turned on gradually:**

- Personalized customer support
- Customizable dashboards
- Mobile accessibility
- AI agents and automation

## 8. There isn't a steady internal champion responsible for success

Some CRM implementations are treated like check-the-box activities: Once a launch is complete, progress stalls because internal resources aren't set up to lead the charge.

There are numerous stakeholders involved in CRM project leaders, from IT support and developers to business leadership and external consultants. But over time, one of the most instrumental roles is that of the CRM champion — an internal leader assigned to monitor high-level success, understand adoption trends or issues and ensure that the CRM vendor continually provides the latest services and features.

**The following are common pain points that indicate a need for stronger internal accountability:**

- Nobody fully owns the vendor relationship.
- There isn't a clear way to provide user feedback.
- User engagement is in decline.
- New functions are slow to turn on.
- Training is minimal or non-existent.



## 9. The CRM experience is out of touch with business reality

There are functions of a CRM that are universally valuable. But generic implementations don't address unique operating conditions, market dynamics and customer needs.

A one-size-fits-all CRM system doesn't reflect reality on the ground. To maximize the value of a CRM and drive adoption, teams can make enhancements, configurations and connections that account for the way work gets done within a specific industry environment. A tailored experience helps address diverse needs for customer engagement, pipeline management and data analytics — and gets in front of frequent sales and marketing challenges that arise in different sectors.

**For instance, a tailored experience can position a CRM to navigate and automate:**

- Industry-specific regulations and compliance.
- Community and membership portals.
- Specialized project management.
- Complex case management.
- Volunteering and fundraising .

## 10. The system is inflexible and struggles to adapt over time

A CRM system that cannot flex to meet changing conditions and evolving priorities won't live up to expectations and will be expensive and difficult to maintain.

For long-term CRM success, it's important to think beyond today. Will the platform still meet your needs if your team triples in size or your workflows get more complex? Organizations that get locked into the status quo will struggle to scale or adjust their CRM, which may limit their ability to meet growth targets. The most effective CRM can adapt without blowing up the budget or requiring extensive customizations.

**Here are potential scenarios that require flexible, adaptive CRM technology:**

- Expanding markets or new partnerships
- Shifting needs for remote and hybrid work
- Changing requirements for data protection
- Increasing CRM investments by competitors

# Upgrading your CRM game

## What to consider when the status quo isn't working

Now that we've examined the red flags that can derail implementation, let's step back to answer an important question that lingers behind the scenes: **When and how does an organization know that they need to invest in a new CRM strategy?**

As with any technology, it's always important to regularly evaluate how things are going. For example, a CRM platform — or a series of makeshift sales and marketing processes — may have worked well enough five years ago but may no longer fit with today's business model, customer expectations or sales strategy.

Some teams may discover and decide that an outdated platform needs to be fully replaced. Staying with legacy systems may feel comfortable, yet it can hold organizations back from improving customer experience, accelerating sales cycles or launching new services.

But CRM replacement isn't always the right approach to take. Before an expensive switch to a new CRM, leaders should take a close look at whether a current system is working at maximum capacity or whether it would benefit from a strategic tuneup.

A hand holding a smartphone with a blue circular callout overlay. The callout contains the text 'ONLY 37%' in large white font, followed by 'of sales professionals strongly agree that their organization fully utilizes its CRM.' in smaller white font.

ONLY 37%

of sales professionals  
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# When it's time to make a change, here are 5 questions to ask before you invest or upgrade:

## STRATEGIC QUESTIONS

## KEY CONSIDERATIONS

### 1. Are spreadsheets driving our business?

It's likely time to retire those spreadsheets and manual processes for a more efficient, collaborative and intelligent system. Yes, there's a cost to change current practices — but there's also a high cost in not making changes to modernize a business.

**Quick tip:** If you're already working in a platform that offers CRM features (like your ERP or productivity suite), it might be more efficient and cost-effective to build on that rather than start from scratch.

### 2. Do the economics still make sense?

It's true that upgrades and newer platforms come with a host of expenses. But older CRMs often require more IT support, third-party plug-ins, workarounds or custom development.

**Quick tip:** When the maintenance cost and effort start to outweigh the value delivered, it may be time to explore a more modern, cost-efficient platform.

### 3. Are we leaving automation on the table?

Modern CRM platforms include AI-driven insights and predictive analytics. With built-in AI — pulled from clean and accurate data — teams can better prioritize leads, see trends in customer behavior and automate routine tasks. Additionally, AI capabilities take on administrative tasks and make it easier for users to interact with the CRM, spurring greater adoption, compliance and productivity.

**Quick tip:** If your current system doesn't use AI as a technical advantage, you're likely missing opportunities to improve efficiency, customer engagement and sales forecasting.

### 4. Does the CRM know our business?

General-purpose CRM solutions meet the common denominators across all businesses. But most organizations need a system that is tailored to some degree — whether it's for their industry, their business or even for individual users. Targeted CRMs that are built to understand the business can unlock more precise and purposeful outcomes.

**Quick tip:** Some CRMs come preloaded with industry-specific features, such as loan tracking for financial institutions or tenant management for real estate. If you find one that understands your world, it saves time and typically reduces the amount of customization that's needed.

### 5. Are users satisfied and productive?

There are endless reasons users might be dropping off or even actively avoiding a CRM system, whether it's that the CRM isn't connected properly to other systems they use every day, or the data isn't accurate and timely enough or users simply aren't trained to maximize their CRM experience.

**Quick tip:** A system that becomes a burden offers zero value to your business. It might be time to think about your internal bandwidth to support users and advance adoption — and whether to enlist outside help through a change management and implementation consultant.



# Wipfli's CRM strategy and integration support

**Investing in sales and customer experience is critical to your organization's success. But an enterprise CRM platform alone won't change the game.**

Wipfli works with you to prioritize the right technical features and helps ensure that the implementation drives long-term value. Our specialists help integrate the platform within your IT infrastructure, mobilize users across the enterprise and customize the environment so it truly works for you — and your customers.

## How we support your implementation

- 1. Getting started**  
We start with your vision — not the technology. Wipfli helps clarify business objectives and user needs, then we work with you to select the right CRM solution.
- 2. Putting a plan into action**  
The CRM implementation is built to meet your needs. Wipfli is by your side, from data migration and security to configuration and user training.
- 3. Modernizing the technical experience**  
A CRM should make life easier for all stakeholders. Wipfli works with you to integrate AI and automation to take on specialized tasks, ramp up productivity and provide management with deep visibility and insight.
- 4. Managing through change**  
Long-term success means ongoing maintenance and enhancements. Wipfli helps ensure your CRM solution is continually up-to-date and delivering enterprise value.

# Harness the power of a modern CRM

Learn more at  
[wipfli.com/crm](https://wipfli.com/crm).

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