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5 Signs You Need to Realign Your CRM

Is your system working FOR you or AGAINST you?

Based on key lessons and best practices shared during our live **SugarRush session: From Disconnected Systems to CRM Success**, featuring Verplas's award-winning transformation story.

Before you invest in a new CRM or give up on your current one, check if any of these warning signs sound familiar. **Even one checked box means your system needs attention.**

☐ **Red Flag #1:** Staff creating workarounds alongside your CRM

Your team is using spreadsheets, Word documents, or other tools to track information that should be in your CRM. They're duplicating data entry because the system doesn't meet their actual workflow needs.

Verplas's Reality:

While using their CRM for sales contacts, the team was logging customer complaints in Excel, duplicating the same data in Word documents, and managing everything through scattered email threads. One complaint involved 4+ different systems.

Red Flag #2: Low system adoption rates

Only a handful of people use the CRM regularly. Most team members avoid it, complain it's too complicated, or only log the bare minimum required. Licenses are purchased, but seats remain empty.

Verplas's Reality:

Their initial sales-focused CRM had very low adoption. Once they repurposed it to solve real customer service pain points, adoption skyrocketed, and they actually added more licenses.

Red Flag #3: Customers complaining about slow response times

You're hearing feedback that your service is slow, requests take too long to process, or customers feel like they're being passed around. Your team can't quickly access customer history or context.

Verplas's Reality:

Credit requests were taking 12+ months to process (some over a year!). Documents were getting lost. Customers were frustrated. After the transformation: 7-day turnaround times and feedback like "People always know who I am when I ring."

Pause and reflect: are your systems supporting growth or slowing it down? The next two signs might confirm what you already suspect.

Red Flag #4: Duplicate data entry across multiple platforms

The same information is being manually entered into multiple systems. Your team is wasting hours copying data from your ERP to spreadsheets, to email to documents. Information lives in silos.

Verplas's Reality:

A single customer complaint required: finding the contact in Sage ERP (10-15 minutes), logging it in a spreadsheet, duplicating it in a Word document, coordinating via email, and maintaining paper files. The same data, 5 different places.

Red Flag #5: Your CRM doesn't match current business priorities

The system was set up for one purpose (like sales pipeline management), but your business focus has evolved. You're trying to force the system to do things it wasn't designed for, or ignoring it entirely.

Verplas's Reality:

Their CRM was built for sales opportunity tracking, but their real business challenge was customer service excellence. Instead of abandoning the system, they repurposed it—and won gold at the CXA Awards for customer service.

Now what?

On the next page: See where you stand and start building a system that supports your team – not the other way around.

If you checked:

☑

One warning sign is enough to impact your business. Your system needs attention.

☑ ☑

Two red flags suggest serious inefficiencies. You're likely wasting hours every week.

☑ ☑ ☑

Three issues mean your disconnected systems are significantly hurting productivity and customer experience.

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Four red flags indicate major problems. Your team is fighting your systems instead of using them.

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All 5 issues? Your disconnected systems are costing you time, money, and customers every single day. It's time for a transformation.

See how Verplas fixed all 5 of these issues

sugar RUSH
WATCH NOW ▶

Watch the complete session recording, where Sarah Lathbury, Commercial Manager at Verplas, shares the exact steps they took to transform their disconnected systems into an award-winning customer experience.

WATCH THE FULL SESSION →

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