Customer Relationship Management (CRM) Ebook

Fit Small Business

Table Of Contents

Click on the title below and jump straight to that specific section.

Jump back to table of contents.

Customer Relationship Management (CRM)

Customer relationship management, or CRM, software is a comprehensive database sales teams use to track customer activities, leads, and sales opportunities. It includes tools like contact management, advanced reporting, and lead prioritization.

Since all sales information is logged in your CRM, it provides business insights for your entire sales, marketing, customer service, and finance teams, and allows you to tailor interactions and enhance the relationship with your customers.CRM software costs range from free to more than $100 per user, per month, depending on the CRM provider and its features.

Whether you're shopping for your first CRM system or want to maximize the solution you’re already using, this guidebook can help you every step of the way.

Jump back to table of contents.

Chapter 1:
What is a CRM?

Before the advent of customer relationship management (CRM) software, salespeople used spreadsheets, contact sheets, and stacks of business cards. Instead of cluttered cabinets full of files and fragmented information, CRMs serve as a living record of important business information. It's a powerful analytics solution that enables companies to learn things about their business that they would never otherwise have noticed.

CRMs also provide a central platform for a salesperson to organize and manage information about leads and customers. For example, new leads can be added to a CRM, qualified, and then moved through the sales process. In addition, customers and contacts can be organized, and segmented, while keeping all customer communication in one place.

[Jump back to table of contents.]

While shopping for CRM software, it's important to keep in mind that some sales tools on the market offer similar features to CRM platform. However, these tools aren't quite up to the job of managing the granular customer details sales teams need.

Examples of sales tools that aren't customer relationship management software include:

- **Email marketing and management:** Sales tools like Mailchimp are great for creating and sending email campaigns to targeted customers. While they do help manage contacts and email preferences, they don't manage leads generated by those sent messages efficiently, which is why many email management platforms integrate with CRM software.
- **Marketing automation:** While some CRM software and marketing automation platforms have overlapping features, marketing automation software providers like Marketo are chiefly designed to help sales teams generate and nurture leads. CRMs are best for managing the long-term sales cycle once you've converted a lead to a customer.
- **Content management:** Although it's easy to confuse a CRM with a content management system (CMS), the two have vastly different uses. A CMS platform like Squarespace is a sales tool for creating, storing and publishing website content and digital assets that are used to generate customer interest.

Jump back to table of contents.

The right CRM software solution for your business depends on several factors, including your budget, the size of your team, and what features you want. Here are some of the on the market today with a range of features and price points to fit most every need.

Top CRM Software for Small Business

	Freshsales	Zoho CRM	Pipedrive	HubSpot	Salesforce
	freshsales	ZOHO	pipedrive	HubSpot	salesforce
Free Plan	✓	✓	×	✓	×
Pricing	$-$$	$-$$	$-$$	$	$$-$$$
Best for	B2B teams that want customization capability	Social-savvy teams that need order management	Product-focused teams that want at-a-glance insights	Budget-conscious marketing teams	Robust sales teams that want advanced features
Business Size	S, M, L	S, M, L	S, M, L	S, M	S, M, L
Deployments	Cloud	Cloud	Cloud	Cloud	Cloud
User Rating	4.4	4.1	4.5	4.7	4.1
Where to Find	Visit Freshsales	Visit Zoho	Visit Pipedrive	Visit Hubspot	Visit Salesforce

[Jump back to table of contents.]

Chapter 2: The Business Value and Benefits of CRMs

Small businesses use CRMs in a variety of ways, primarily in managing leads and customers, as well as identifying and moving deals through the sales process.

CRM Business Value

Since a CRM is, at its core, a database, there are a range of ways to use the software to meet your specific needs and add value to your business. Let's look at some examples of how companies use a CRM for their day-to-day business operations.

Strengthen Relationships With Existing Customers

A software sales rep is about to hop on a call with an existing customer. After looking through the customer notes documented in the CRM, she sees that the customer will need more licenses at the end of the month. The sales rep now knows that this conversation will involve upselling so she reviews their pricing tiers and asks for proper support from teammates prior to the call. During the call, she can reference prior conversations and start a dialogue about addressing the customer's needs.

Track Payments and Invoicing

The director of finance within a beverage company sees there's $40,000 worth of unpaid invoices that will officially be late by the end of the month. He doesn't have the time to track down each customer individually and remind them to pay. By pulling a report from the CRM, he can see which account manager is responsible. The finance director can now send out an email to the account managers and ask them to send out payment reminders to their accounts.

Manage Marketing Campaigns

A marketing manager is creating an email campaign to promote an upcoming trade show. She receives a list of over 2,000 attendees and imports their contact information into the CRM. As contacts from the list interact with her campaign, her marketing automation software scores the leads and feeds them back into the CRM.

The sales reps in her company uses that information to reach out to qualified leads before the show preemptively. She can also strategically target prospects at the trade show and log their interactions in the notes section of the contacts in the CRM.

Benefits of Using a CRM

Studies show that CRMs offer a tangible return on investment. For example, the return on investment (ROI) for businesses that use a CRM to manage customers is shown to be $8.71 for every dollar spent on software.Clearly, the benefits of using CRM software are too numerous to overlook.

Fewer Lost Leads

Leads can come from several different sources. They can come from trade shows, forms, and chatbots on your website, cold outreach, and marketing campaigns. The diverse origins of leads can make them hard to track and follow up on. Companies used to use spreadsheets if they used anything at all. With a CRM, leads are fed directly into your database so that they don't fall through the cracks.

CRMs also allow you to set rules so that specific leads go to an individual sales rep. Distributing leads on a rotating basis can ensure that they're equally distributed and don't cause conflict between reps. Once the lead is distributed, automatic reminders can be scheduled so that reps stay on top of follow-ups and input the correct information.

Jump back to table of contents.

Improved Customer Satisfaction

CRM helps improve the customer experience from start to finish. Improving customer experience begins with the proper distribution of leads. Similarly, other customer-related tasks can be assigned so your team takes action at the right time. Customer satisfaction is often in the details.

The automation of customer service or follow-up tasks ensures that customer requests don't fall through the cracks. The collaboration between departments enabled by CRMs allows teams to serve and delight customers by diligently following through and remembering small details.

Increased Productivity

CRMs increase productivity by eliminating manual tasks. Calling, emailing, pulling reports, and account reviews are all streamlined by CRM. Having all of your customer information in one place prevents you from having to track down information from multiple locations. While there is a learning curve during CRM training, this technology will save you time in the long run.

Improved Interdepartmental Collaboration

CRM allows several departments to work in conjunction, all for the benefit of the customer. Management, sales, marketing, finance, and even executives can collaborate using CRM. Providing equal visibility into accounts and sales numbers allows efficient communication between departments. An excellent example of this is sales and management.

Sales teams typically have weekly meetings with management to discuss issues and goals. CRM allows the sales manager to already have an idea of the reps' performance, goals, and issues before going into the meeting.

Jump back to table of contents.

Accurate Reporting & Forecasting

Pulling reports can be accomplished by every department within your company. Like an advanced Excel spreadsheet, the filters in CRM allow you to easily pull the information you're searching for. For example, sales reps can pull a report of every account that hasn't been called on in two weeks, or sales managers can pull reports on who's behind their quota for the month. Each of these allows decision-makers to have access to the best information available.

Scalable Sales Process

CRMs allow efficiency in the sales process so that scale is possible. The number one way to tell if your sales process is scalable is whether or not it's repeatable. That means that your process goes as smoothly while handling 50 leads as it does when you have five. Because CRMs have established steps and procedures that must be followed, this ultimately leads to scalability.

Shortened Sales Cycle

A sales cycle is the journey starting from lead generation to winning the sale. The shorter your sales cycle, the more time you have to work on other deals and generate more revenue. CRM helps shorten the sales cycle by ensuring lead follow-up and proper management. Lead-scoring integrations allow you to spend your time on the leads that have the highest probability of being converted into customers.

Jump back to table of contents.

Chapter 3:
A Cost Overview of CRMs

Customer relationship management software costs range from free to hundreds of dollars per month, depending on the provider and the types of features it offers. Free or very low-cost solutions are no-frills platforms that may be limited in the number of users it supports or features it includes. These are best for solo business owners and small teams on tight budgets.

High-end CRM software contains myriad features, from advanced customization options to comprehensive business phone systems. Pricing for these CRMs can run as high as several hundreds of dollars per month and are usually used by enterprise-level organizations with budgets to match.

Mid-range CRM software solutions are more moderately priced, ranging from $20 to $80 per user, per month. They contain enough features and tools to accommodate most sales teams and small businesses.

However, the cost of ownership of a CRM doesn't always end when the bill of sale is paid. There can be additional costs managers, and business owners should keep in mind when considering the total cost of a CRM software solution.

Jump back to table of contents.

These include:

- **Internet:** The most popular CRM solutions today are hosted in the cloud and require a stable internet connection to access.
- **Cell phone plans:** Many CRMs offer companion mobile apps so that sales agents can access the system while away from their desk or on business travel from their company-provided smartphones.
- **Monthly or yearly subscription fees:** Providers that offer cloud-hosted CRMs typically charge monthly or yearly fees in exchange for system management and maintenance.
- **Information technology (IT) support:** Organizations that prefer to host the CRM system themselves need to factor in the cost of IT personnel to keep it running smoothly.
- **Training:** Employees need to be trained on the CRM to get the most out of it. Costs of worker downtime and, if needed, onsite trainers, add to the total cost of ownership.
- **Add-ons:** Many CRMs offer add-ons like 24-hour customer support or premium features that can add up quickly.

The advertised cost of a CRM may show only part of the picture, with maintenance costs, phone service, and more adding to the bottom line. The good news is most CRM providers will work with you to find a solution that meets your team's needs and budget. Customer relationship management solutions come in dozens of variations and a range of price points. Sales teams can't afford to be without the valuable information they provide, from reporting tools and workflow automation to agent performance tracking.

Companies wanting a CRM with superior features, that's easy to use, and comes at price points for every budget should check out **Freshsales**. Freshsales offers a basic free plan with support for unlimited users and three paid options from $12 to $49 per user, per month, and is ideal for sales teams on a tight budget that can scale with them as they grow. Visit Freshsales' website to sign up for a forever-free plan or to request a free demo.

You can learn more about other providers and how they stack up by visiting our CRM reviews page.

Jump back to table of contents.

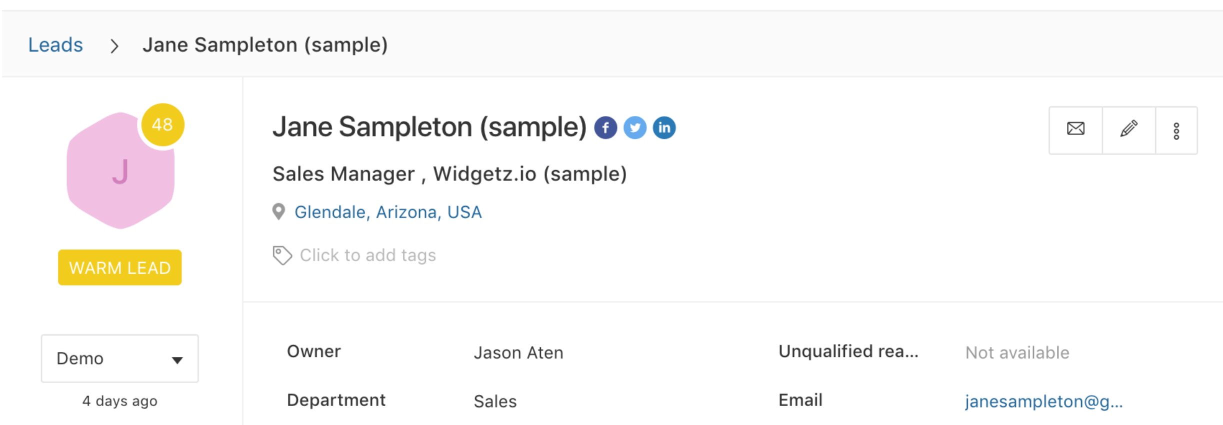
Chapter 4: CRM Features & Functionality

CRM software features vary from sophisticated enterprise-level software that automates virtually the entire sales process to no-frills email contact management plugins that help you keep track of customer communications.

Navigating the different CRM features and options can be overwhelming when making a decision about which are most important to your business, so here's a look at the CRM functionality that matters most.

Lead Qualification

One of the most important CRM features is the ability to have the software help you determine which incoming leads best fit your customer profile. This can help your sales team focus most of their efforts on the highest quality opportunities, and avoid wasting time on prospects that aren't a good fit.

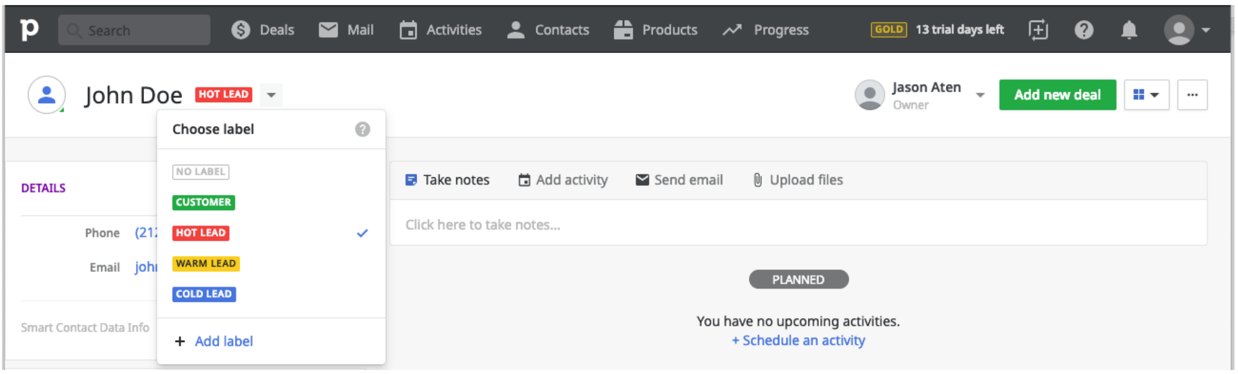


Lead qualification in Freshsales

Jump back to table of contents.

Lead Scoring

Automated lead scoring is a core functionality of many of the best CRMs, helping your sales team quickly assess, which leads deserve their attention, and which ones need to be nurtured before they turn into sales opportunities or deals.

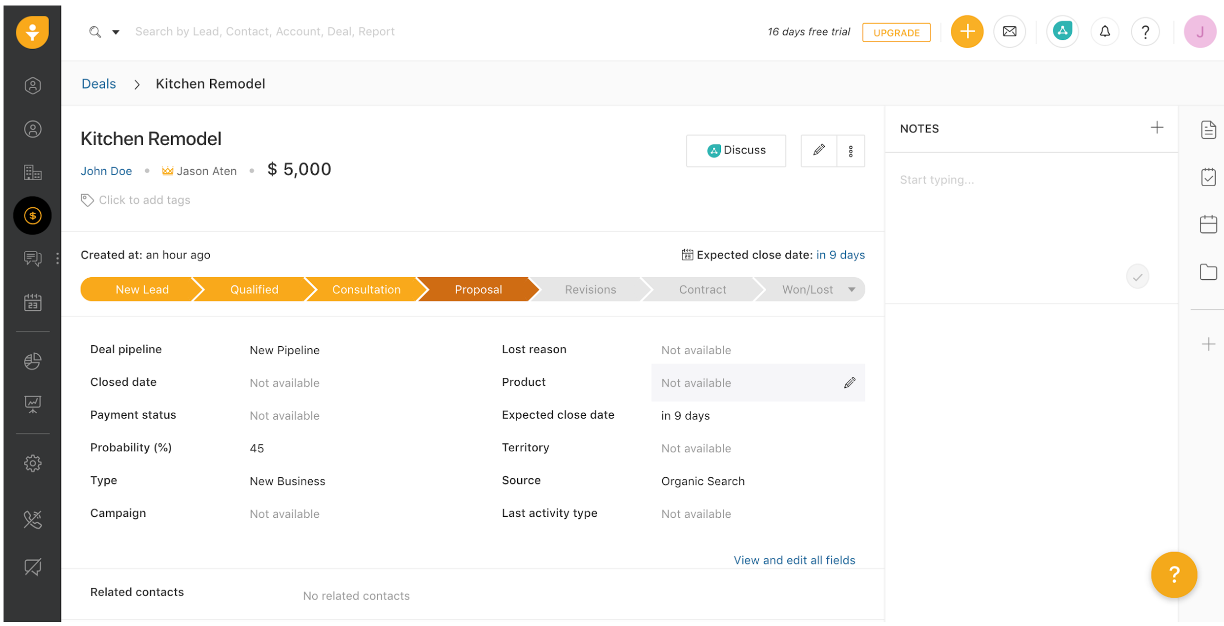


Pipedrive lead scoring labels

Jump back to table of contents.

Sales Forecasting

Sales Forecasting evaluates the likelihood of different sales opportunities closing, based on where they are at in your sales process, and helps you visualize your team's sales revenue performance. Forecasting is an important tool both in sales planning, but also in overall business management as it helps you assess and predict your future revenue based on your sales efforts.

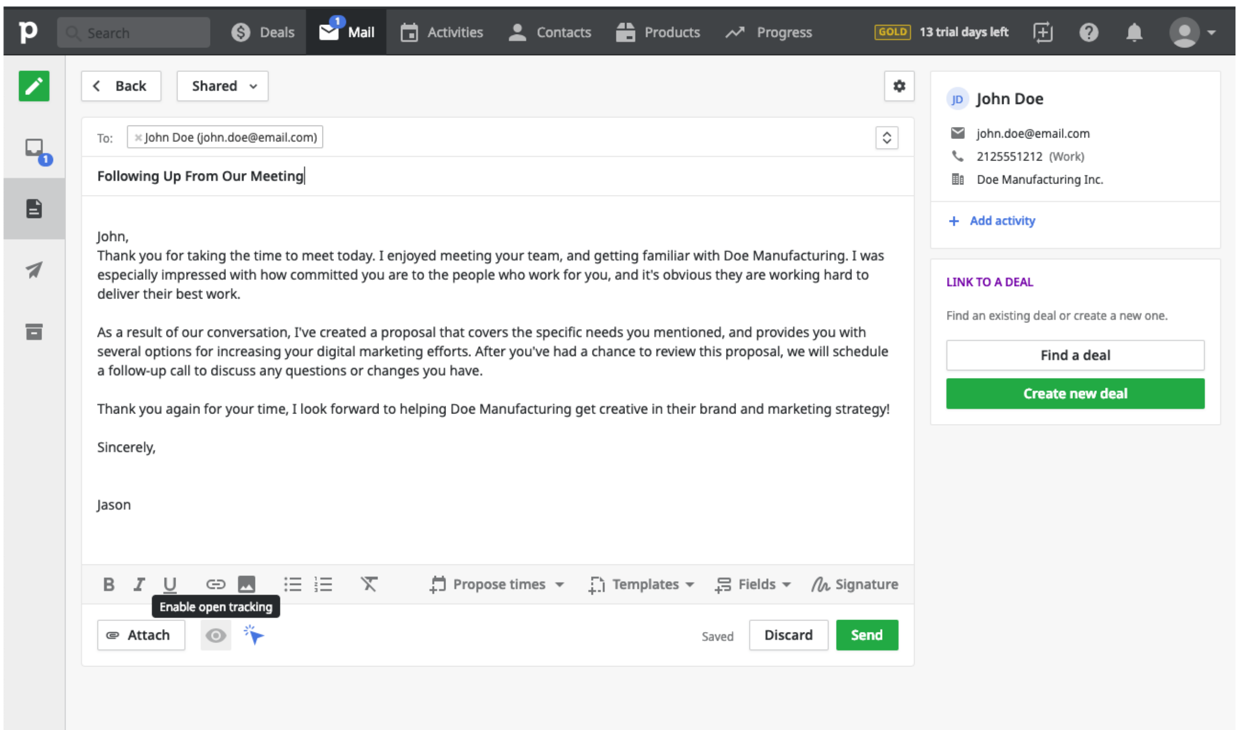


Sales forecasting in Freshsales

[Jump back to table of contents.](#)

Email Tracking

Many CRMs allow you to email your leads and customers directly from within the CRM software, enabling you to not only keep track of conversations, but also track activity like when a contact opens an email, or when they click on a link within the email. Most CRMs also include templated emails that you can use to reply to inquiries automatically, and then keep track of how the lead responds from within their contact profile.

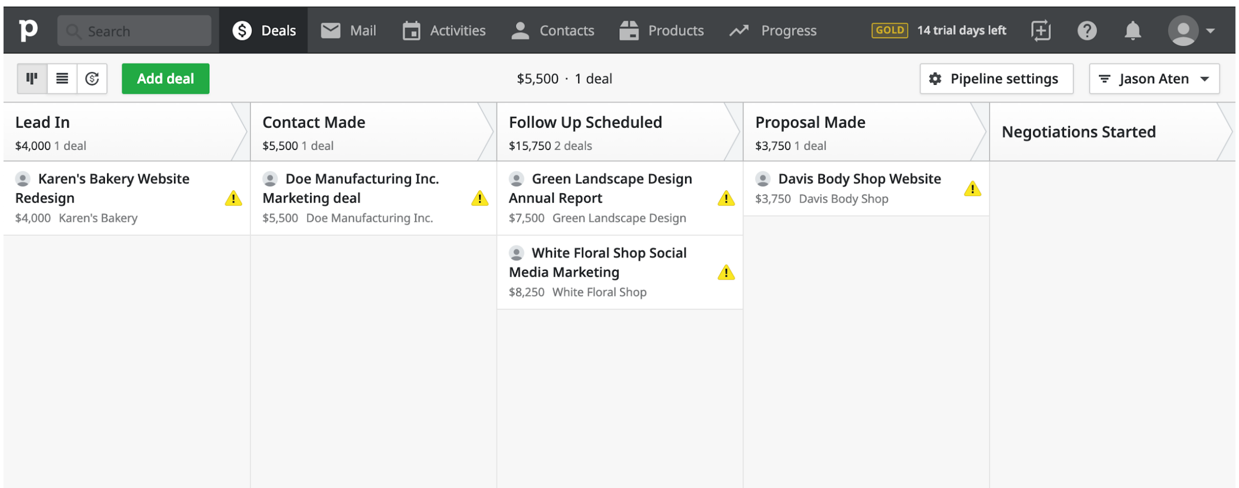


Pipedrive email tracking

Jump back to table of contents.

Sales Pipeline Tracking

Monitoring the progress of sales opportunities is another key CRM functionality. Many CRMs have a built-in default sales pipeline that you can implement in your sales process, or customize to match your specific needs. In both cases, the pipeline is the best representation of the process your sales opportunities travel through, and the ability to track your sales pipeline is one of the defining features that sets a sales CRM apart from a simple contact and calendar manager or a project management tool.

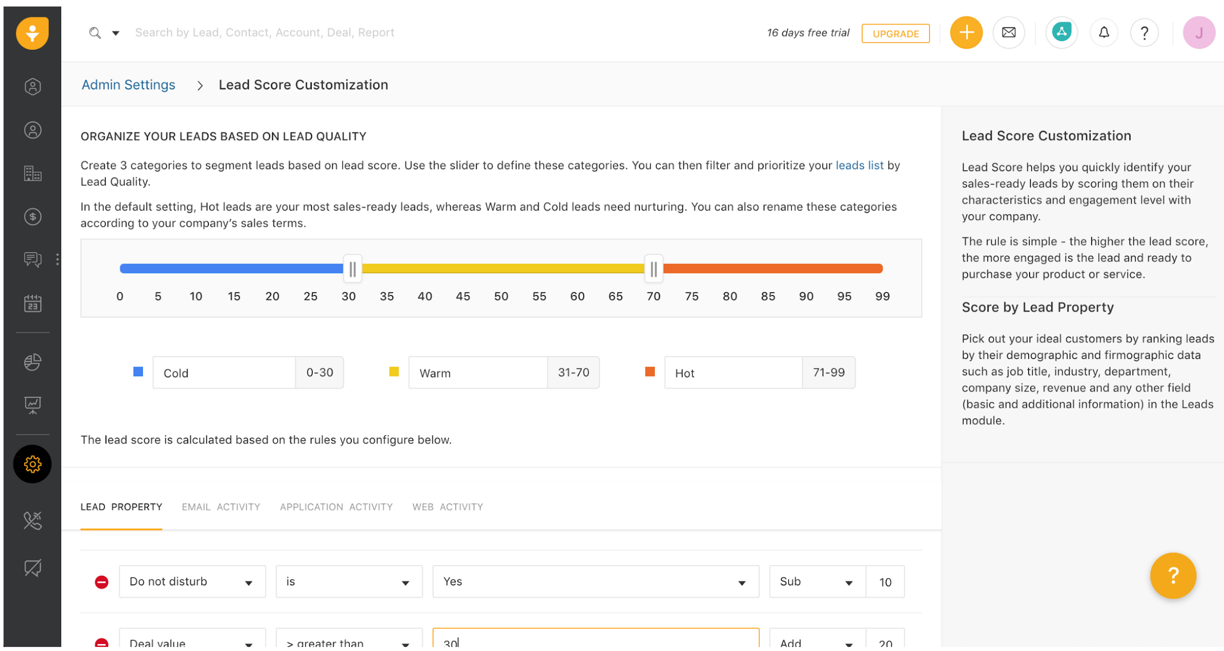


Pipedrive's visual sales pipeline interface

[Jump back to table of contents.]

Customization

Customizing your CRM to fit your specific business is an important feature for many companies, especially those with complex or non-traditional sales cycles like manufacturing companies, or small businesses who sell services to large enterprises. CRMs offer varying degrees of customization, but most allow you to define things like stages of your sales cycle, lead scoring variables, and the types of contact information you collect.

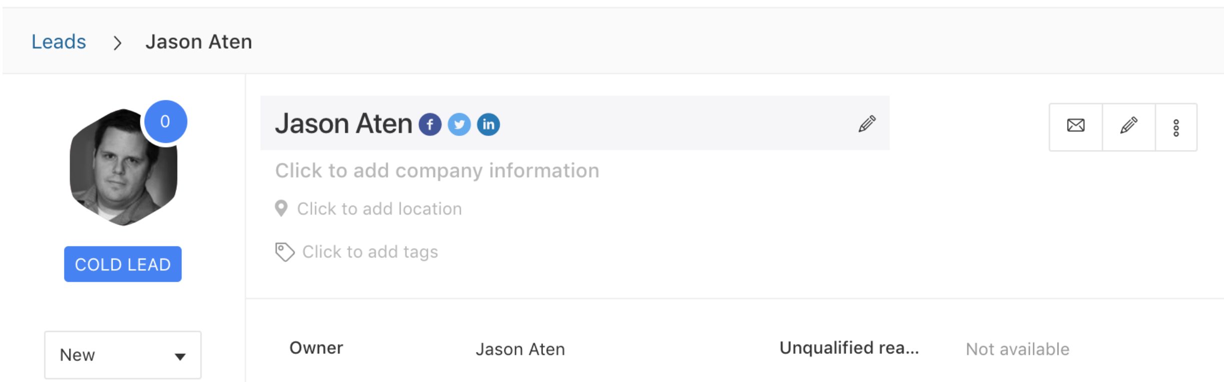


Customization interface in Freshsales

Jump back to table of contents.

Social Media Integration

Integration with social media is an important CRM feature for businesses that find new customers through social networks like Twitter, Instagram, and Facebook. Integrations include the ability to have the social profiles of your contacts automatically import into your CRM, being able to view your contact's social media activity and monitor brand mentions for new leads.

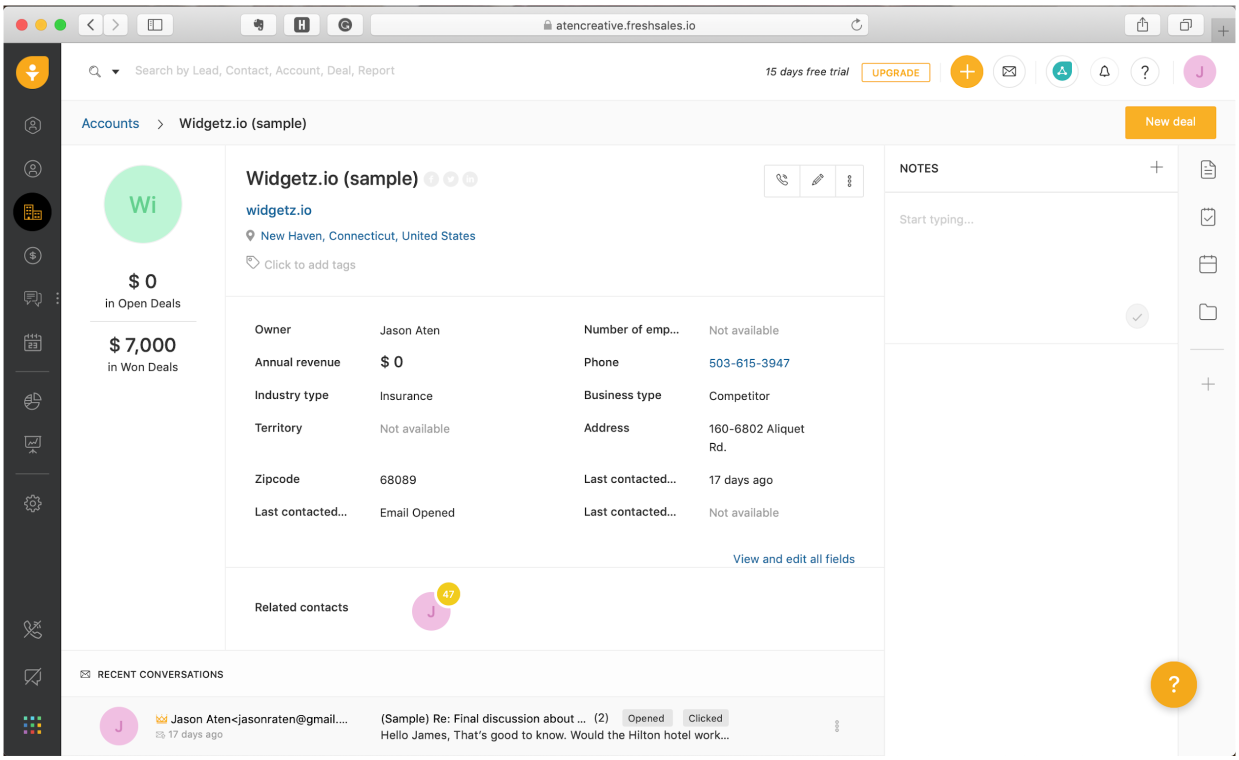


Social media integration in Freshsales

[Jump back to table of contents.]

Cross-platform Compatibility

Many sales teams include remote and distributed team members who often bring their own devices. The reality is that very few software solutions run on only one platform and CRMs are no different. Support for cross-platform functionality includes MacOS native software, cloud-based apps that run in Safari and Chrome, and mobile apps available on iOS and Android devices.

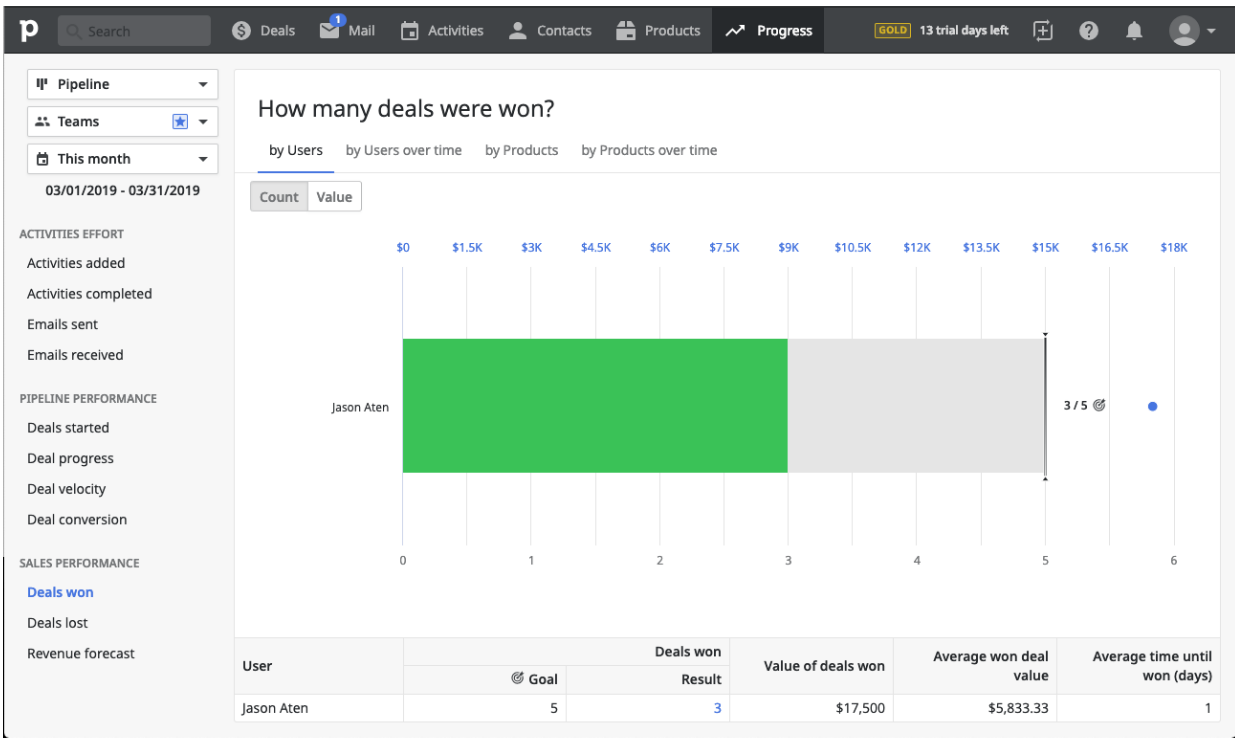


Freshsales running in Safari on MacOS

[Jump back to table of contents.]

Reporting and Analytics

This crucial CRM feature allows you to track and monitor the progress of your activities and sales opportunities. It helps you by giving you an at-a-glance perspective of how your customer relationships are growing and generating sales revenue for your business.

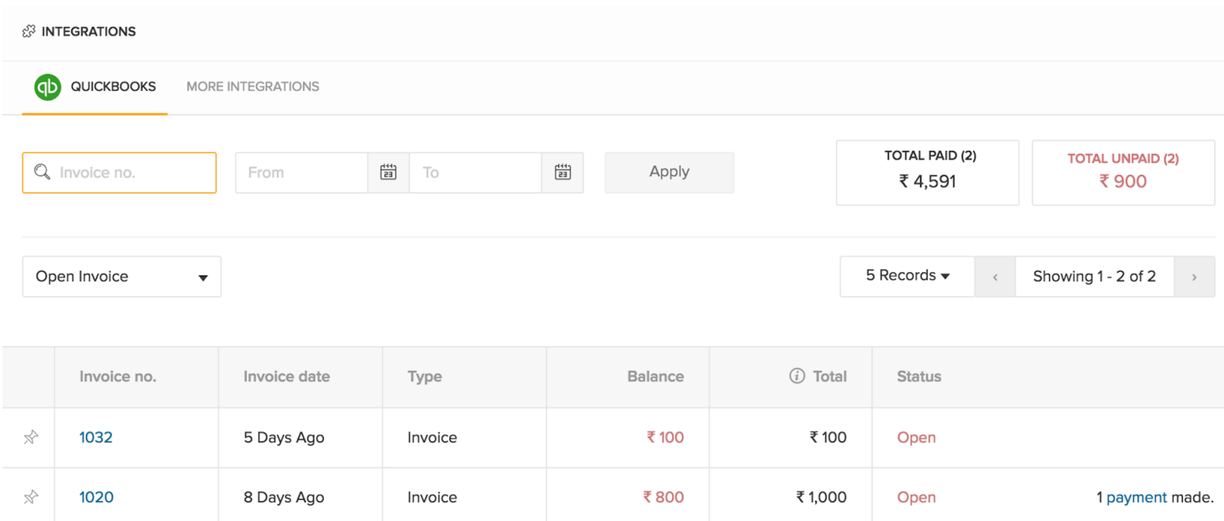


Pipedrive sales reporting

[Jump back to table of contents.]

Accounting Software Integration

While CRMs handle contact management, most are not built for managing your finances, making integration with accounting software essential. QuickBooks is the leader, and most CRM options available today feature some kind of integration that allows you to share invoices and sales revenue between the two.

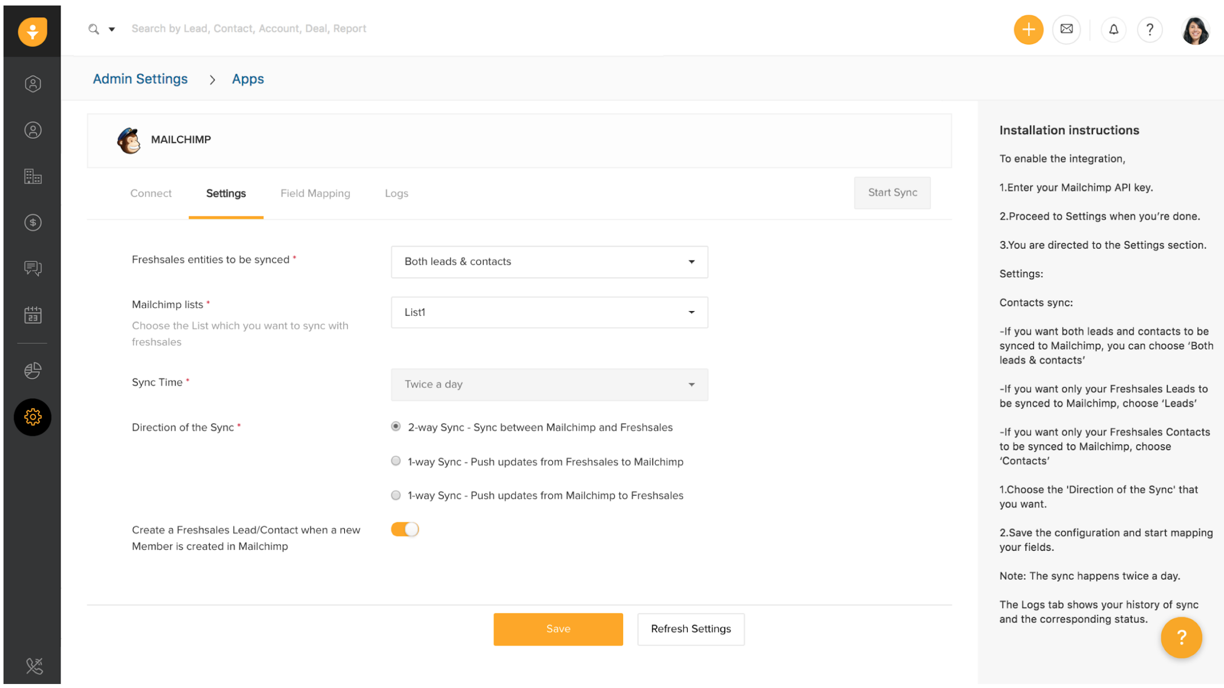


QuickBooks integration in FreshSales

[Jump back to table of contents.](#)

Email Integration

Outlook and Gmail are two of the most used email platforms, and both mail and calendar software are used by businesses everywhere. Many CRMs offer the ability to connect to connect to your Gmail or Outlook email and calendar as a way of helping you keep all of your important tasks, calendar, and communications details in one place at all times.

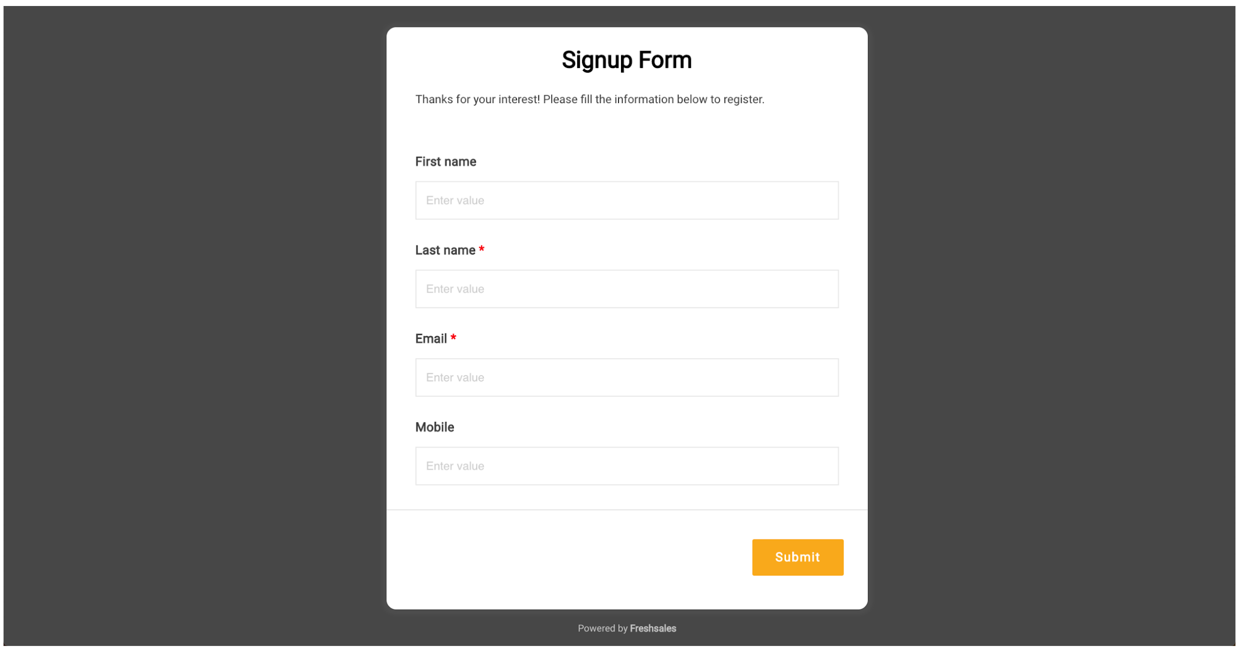


Mailchimp integration in Freshsales

Jump back to table of contents.

Many CRM offer integrations to connect to your website landing pages and contact forms. This allows you to capture contact information and generate leads automatically when someone completes a contact form, or sends and email from your website. The contact is created in your CRM with the form details included in a note, allowing your sales team to follow up and take action on the contact while keeping track in the CRM.

Website Integration


Signup Form

Thanks for your interest! Please fill the information below to register.

First name

Enter value

Last name *

Enter value

Email *

Enter value

Mobile

Enter value

Submit

Powered by Freshsales

Integrated signup form from Freshsales

There are as many different combinations of CRM features and functionality as there are systems available in the market today, given teams the flexibility to select the product that works best for their individual needs. However, no matter which CRM is selected, the software serves as a critical tool helping sales teams manage deals and contacts.

One of the best CRMs for small businesses is Freshsales. Freshsales offers a free forever plan that includes many of these features and functionality as well as more robust options as part of its paid plans. You can also visit their website and sign up for a free trial of any of their plans and see how each of these features can benefit your sales team.

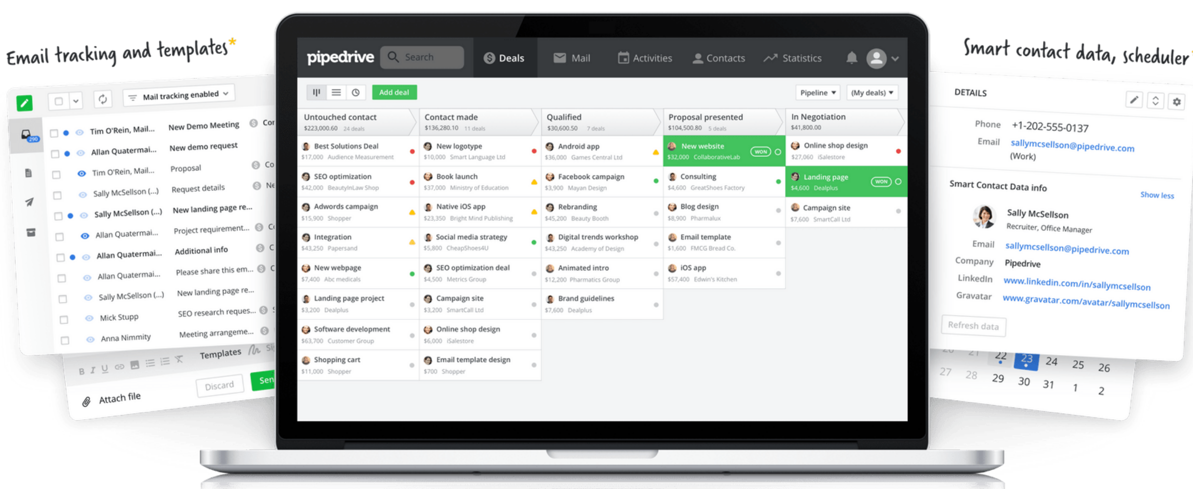
[Jump back to table of contents.]

Chapter 5:
Types of CRM

There are many types of CRM software, differentiated by features built specifically for industries or job roles. The most popular CRMs focus on traditional salespeople, but some are built specifically for ecommerce websites, project management, operations, mobile salesforces, marketing teams and more. Let's take a look at some of the most common types of CRM on the market today.

Sales Management CRM

Sales-focused CRM software allows you to manage your leads, contacts, and pipelines; they also facilitate sales activities like cold calling and emailing. You can even set up workflows for repetitive sales tasks to increase efficiency. This type of CRM keeps sales tasks front and center with features like activity reminders, task assignments, visual pipelines.



Pipedrive's visual pipelines make it easier to manage sales activities

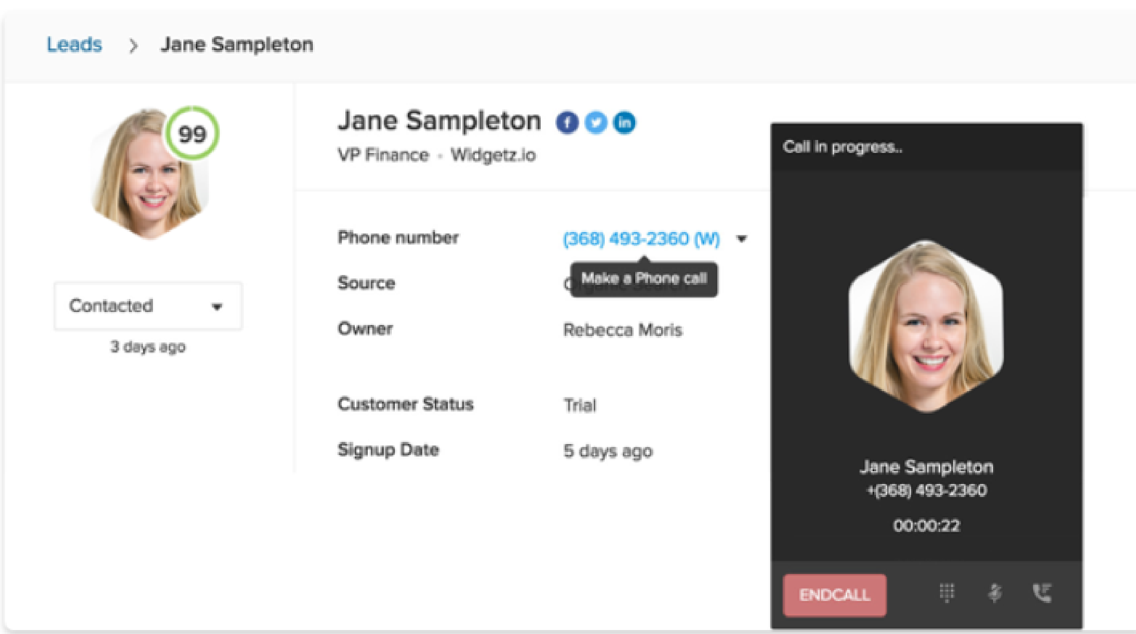
Jump back to table of contents.

Marketing CRM

Marketing-focused CRM software aligns the efforts of multiple teams or departments. In addition to providing contact and pipeline organization, it also enables you to perform and track marketing activities, including email, social media, and mobile marketing campaigns. Marketing CRMs can also track offers that customers and prospects may be eligible for, allowing sales and marketing to work together.

Telesales CRM

Telesales CRM software allows sales professionals and business owners to make and track calls from within the CRM. This type of solution typically has a phone built into the CRM platform or by integrates with a phone system. It allows calls to be placed without leaving the CRM platform, making it a versatile piece of contact management software. Telesales CRMs usually include advanced features like call recording, voicemail setup, call transfers, call routing, and phone number assignment.

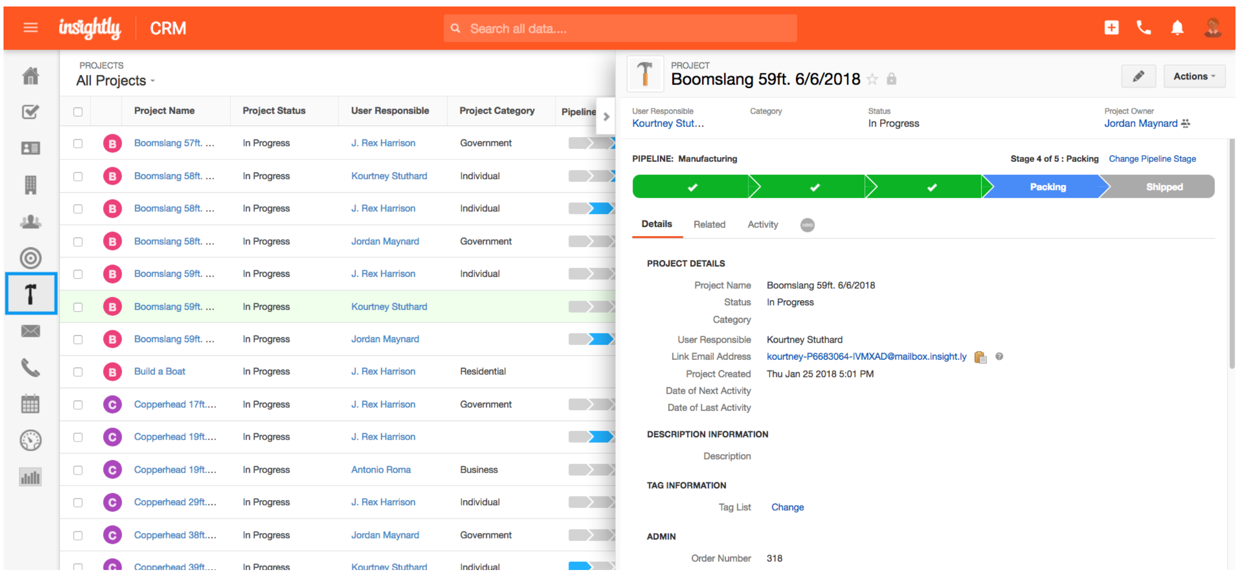


Freshsales' calling feature

Jump back to table of contents.

Project Management CRM

With project management CRMs, teams can manage relationships and handle post-sale projects. They allow salespeople to convert won opportunities into projects so that post- and pre-sale activities are stored in one centralized location. That helps sales professionals stay on top of tasks, milestones, and deliverables, which improves communication and helps grow long-term relationships.



Insightly's project management dashboard

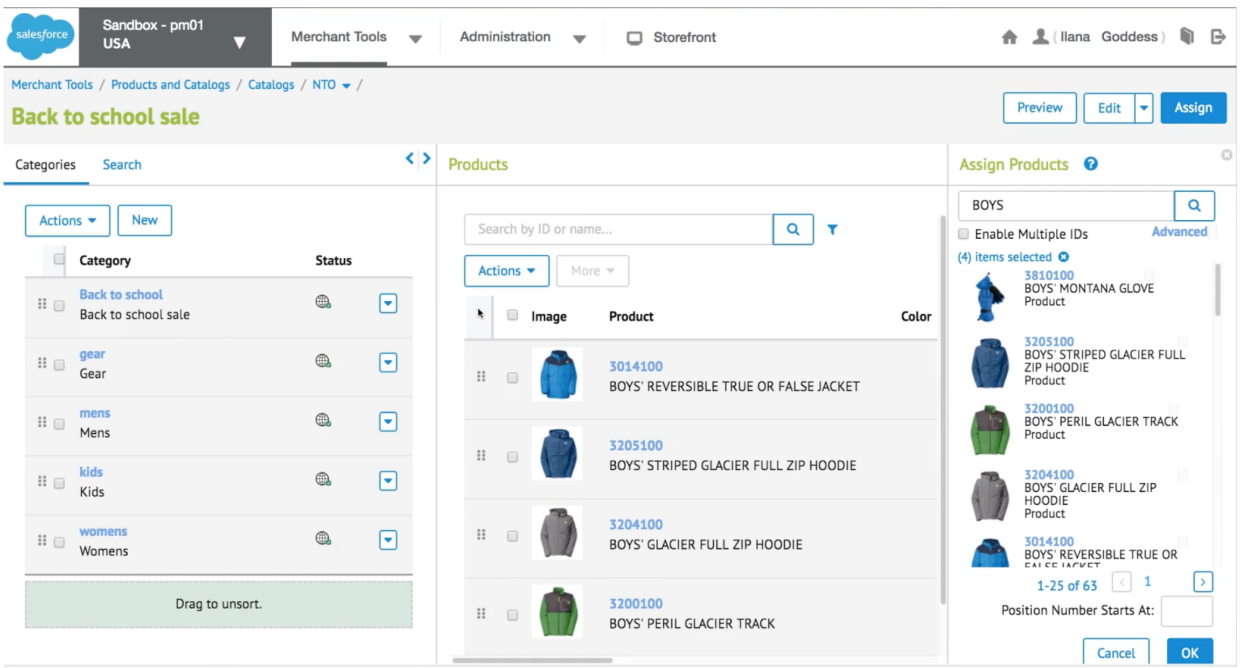
Customer Service & Support CRM

Customer service and support CRMs give sales and customer service professionals a complete view of the customer in one convenient place. These types of CRMs often include call center and help desk software as well as collaboration for team-based support, which work together to provide a unified customer service experience.

Jump back to table of contents.

Ecommerce CRM

An ecommerce CRM allows product-based businesses to arrange transactions directly within the system. They combine traditional CRM features with the ability to process, ship, and track customer orders. Ecommerce businesses also use them to manage inventory, supplier relationships, price lists, customer service, and more.



B2C Commerce in Salesforce

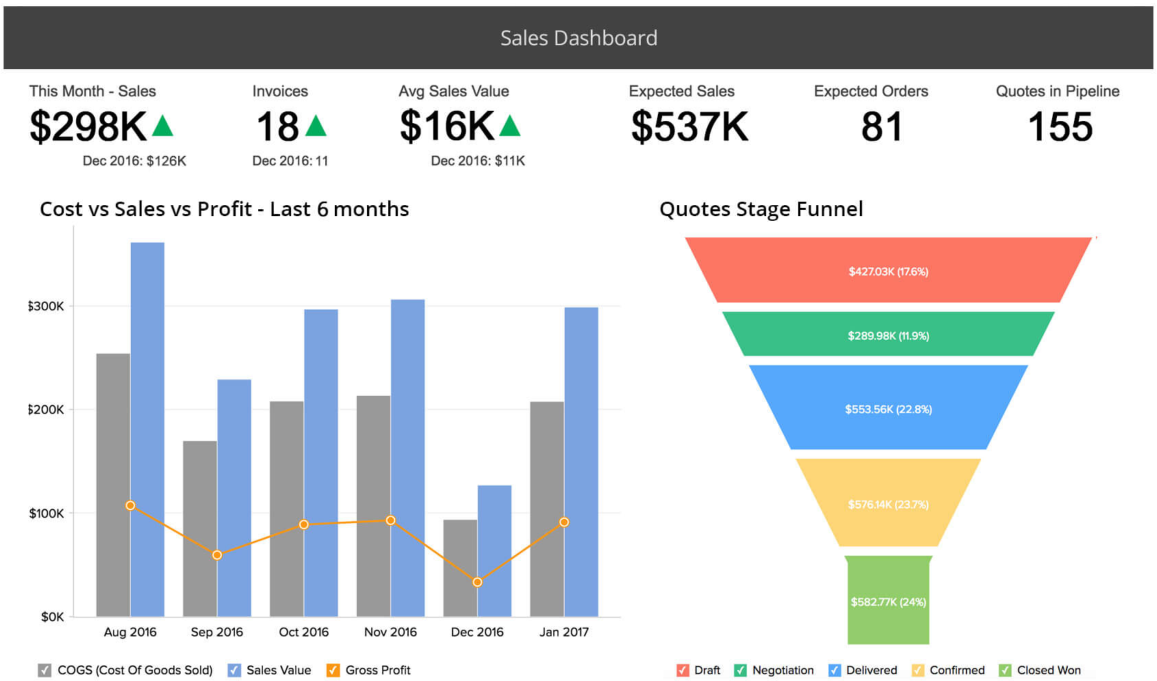
Collaborative CRM

Collaborative CRM solutions enable teams to collaborate while working to close an opportunity or on a post-sale project. Tools like group emails, real-time messaging across multiple teams, document sharing, and video calls keep all team members in the loop and ensure nothing slips through the cracks.

[Jump back to table of contents.](#)

Analytical CRM

This type of CRM software offers advanced reporting and analytics features that help sales professionals create reports to forecast sales or help identify areas of opportunity within your sales process. Using data from previous sales activities to compile reports makes it easy to spot trends or take corrective action in areas of concern.



Zoho's advanced reporting dashboard

Jump back to table of contents.

Operational CRM

Operational CRM software helps sales teams manage and track sales and inter-departmental business functions such as human resources, inventory, support, and projects in one system. This type of CRM typically integrates with accounting software like QuickBooks or Xero to include payment features and payment data and reports based on data from major business areas managers can use to make business decisions.

The vast number of diverse businesses has driven the demand for and creation of different types of CRM software. Small business owners will benefit from assessing what they really need and want from a CRM and choosing the best type of CRM to meet their needs. Whether it's activity or industry-specific, you're sure to find a CRM solution to help you meet your sales and customer relationship goals.

Jump back to table of contents.

Chapter 6:
Industry-Specific CRM

Most types of CRM systems include core features like contact management, opportunity management, and lead management functionality to offer a 360-degree view of customers. However, the CRM market is very competitive with the unique benefits of industry-specific solutions becoming more commonplace every day. Here are just a few of the different options available in the CRM space.

Auto Dealership

These CRMs are for dealerships with aggressive lead generation and post-sale service strategies. Benefits include enabling sales and service teams to close deals, promote service and repeat business, and manage customer finance.

Automotive CRM software offers specialized features like financing, partner management, and vehicle service details that help car sales and service professionals close more sales and retain more service business. Some also include advanced features like inventory management and QuickBooks integration to give business managers and owners a more complete view of their business.

Real Estate and Mortgage

This CRM software is best for brokers and agencies wanting to generate leads and manage long sales cycles. They typically include real estate features like listing management and high volume lead generation.

Real estate CRM software offers specialized features like listing management, real estate task management, and advanced lead generation, which helps real estate sales professionals close more deals. Some also offer mobile apps to accommodate real estate professionals while they're in the field.

Jump back to table of contents.

Mortgage CRM software offers specialized features that help loan officers and mortgage companies better manage their prospects, customers, and referral partners. These features can include tools like automated emails and text messages, website or landing page builders, email campaign features, loan document storage, and team collaboration.

Insurance

This type of CRM is used by insurance professionals who want to manage and perform sales and marketing activities as well as link insurance documents to customers in one platform. Insurance CRM software offers specialized features like electronic application and policy fulfillment. Specialized features also include built-in phones, advanced lead management features, and advanced marketing automation tools.

Construction

This kind of CRM solution is for companies wanting a single platform to engage prospects as well as manage customers and building-related projects. Features include tools that help manage bid requests, proposals, and work order management.

Construction CRM software offers specialized features like project management, requests for bids, and proposal management. It also offers post-project features like payment management, purchase order management, and accounting software integration.

Hospitality

These CRMs help hotels, restaurants, catering, and event planning companies manage current customers and prospects by providing a single platform to engage prospects, fulfill catering orders, or manage events and guest relationships.

Hospitality CRM software offers specialized features like project or event management, proposal creation and management, event-specific document templates, and order delivery management. It also offers features like payment management and team collaboration tools.

Startups

This CRM software is right for businesses in any industry that expect accelerated growth. They are scalable and many free or affordable service plans with tools to build healthy pipelines at an accelerated pace and offer access to sales data and analytics.

Startup CRM software offers specialized features like accelerated outreach tools, reporting, and analytics. Specialized features can include outreach tools like built-in phones, email campaign features, advanced lead management features, and low-cost options.

Business-to-business (B2B)

This CRM type helps B2B salespeople build strong relationships within organizations, as buying decisions can be team efforts. They assist sales professionals with managing multiple contacts or buyers at one company and as well as longer sales cycles.

B2B CRM software offers specialized features like lead and contact enrichment, lead management, outreach tools, pipeline management and acceleration, workflow automation, reporting, and analytics. These features can include tools like built-in phones, email campaign features, and advanced lead management features.

Business-to-customer (B2C) and Call Center

These CRM solutions lead and contact enrichment, lead management, outreach tools, workflow automation, reporting, and analytics. Like B2B CRM software, B2C CRM and call center software help businesses manage relationships with customers and prospects, but typically also includes invoicing and additional direct communication tools. It also includes the ability to segment high prospect and lead volumes through multiple channels like social media, outbound calling, email campaigns, and live web chats.

Jump back to table of contents.

Call center CRM software, in particular, helps businesses with call centers manage relationships with customers and prospects using the phone as their core communication tool. Features include a built-in or integrated phone, call recording, logging, transfer, tracking and reporting.

Check out our useful guide to industry-specific CRMs, for additional information and recommendations.

Jump back to table of contents.

Chapter 7:
Business App Integrations for CRM

CRM integrations allow you to share information such as customer, contact, and lead details with other business software, meaning data can be viewed, updated, and shared across a company. This exchange of data can be done with a CRM's native integrations tools, using a software-to-software interface, or by hiring a third-party data integration services company.

Think of your customer relationship management (CRM) as the hub of a wheel and its spokes as your company's other customer-focused business software such as sales, marketing automation, ecommerce, service, live chat, and so on. All customer information should flow between the CRM and these applications so there is one main reference record – the CRM. That connection between software is the CRM integration.

The areas of a business that benefit the most from CRM integration are sales, marketing, and service. The more aligned these teams are, the more productive they'll be at identifying, attracting, selling, and keeping customers.

In addition to maximizing productivity, CRM integrations help eliminate information islands, giving each team visibility into what the other is doing. By understanding customer behavior with tools such as lead scoring, it also allows the teams to focus on the activities, assets, and customers that are most valuable.

For instance, CRMs that integrate with Slack, a web-based communication service, centralize conversations, and file sharing between users and user groups. Here's a short example of how easy it is to connect Trello with **Pipedrive** CRM. This integration helps auto-create new project cards (tasks) in Trello, attach information from Pipedrive to Trello, and share information across both platforms.

Jump back to table of contents.

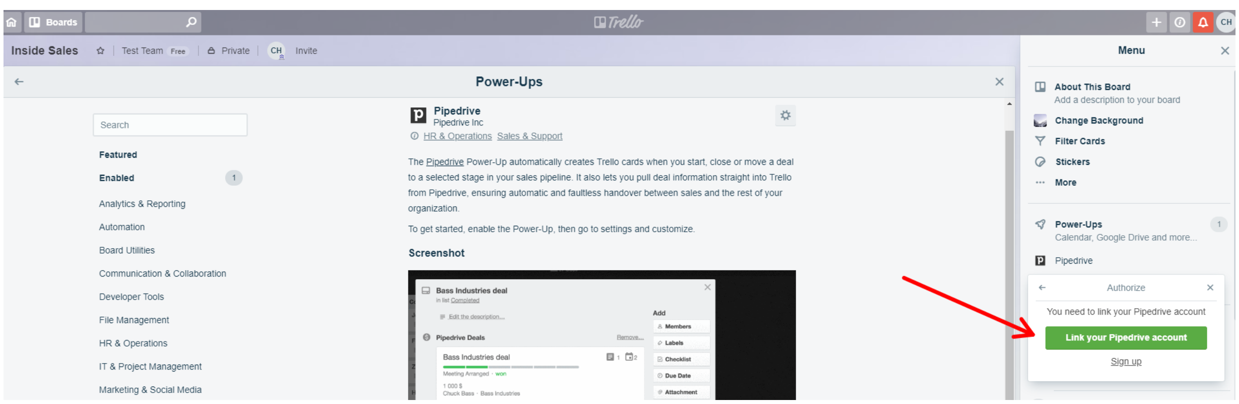
Example of CRM Integration Steps: Pipedrive & Trello

1. Determine Your Workflow

You can use the card auto-create function in Trello to set up project tasks, whether they are during the sales process or after a deal is closed. For example, if you're selling website development services and part of the pre-sales process is to do an initial site assessment, you can create a card to automatically land in your project team's project Trello board workflow once a prospect is moved to a certain deal stage in Pipedrive.

2. Add Pipedrive Integration in Trello

To enable this integration, you'll need to be an Admin User in your Pipedrive account. Go to the Board Menu in Trello and click Power-Ups. Search for Pipedrive and click "Add." Then click Pipedrive under Power-Ups and select "Edit Power-Up settings," where you'll authorize Trello to "link your Pipedrive account" and allow access to information.

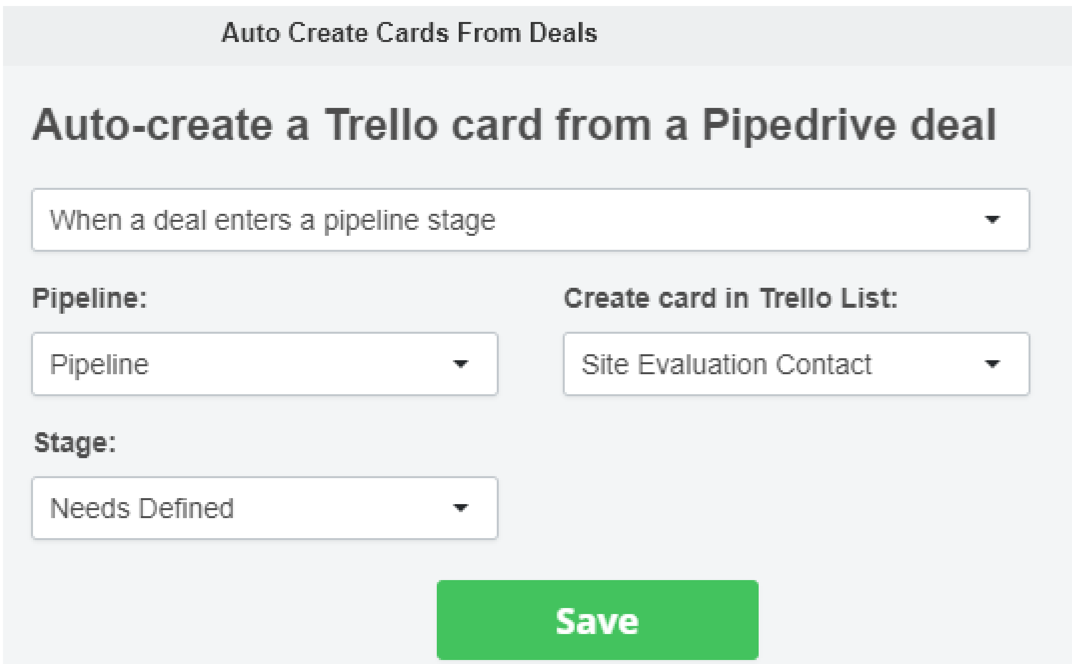


Trello Power-Up manager

Jump back to table of contents.

3. Set Up Auto-create

Once you've linked the accounts, you set up how you want Trello to create project cards from Pipedrive. You'll be given options of when to create cards: 1) When a deal is added to Pipedrive, 2) When a deal enters a pipeline stage, or 3) When a deal is marked as won or lost. From here you can select a particular pipeline to pull from, in which column list you want the card to appear, and its won or lost status. However, you can only set up one rule per board.

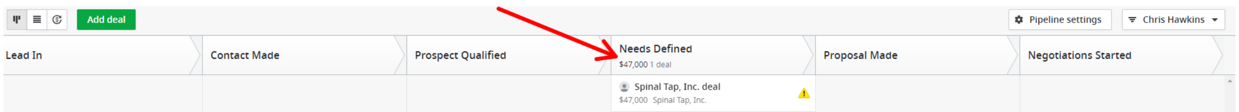


Create rules using Trello

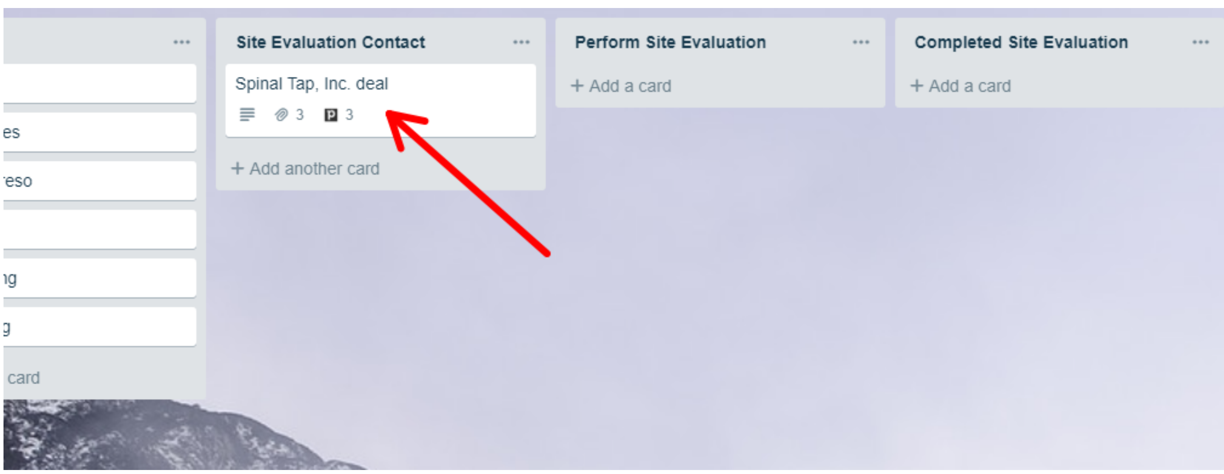
[Jump back to table of contents.]

4. Test the Card Automation

After you've defined your workflow settings, it's time to test the integration. In the example below, the cards are set for an initial website evaluation to be sent to that team in Trello once the deal reaches the "Needs Defined" stage in Pipedrive. As soon as the status changed in my pipeline, it populated the board in Trello. Now that team can see the card and will be able to access the sales rep's notes or attachments.



Pipeline stage as shown in Pipedrive



Card created in Trello automatically

The best CRMs should integrate natively with a wide range of applications from marketing software to accounting to ecommerce platforms. In other words, they should have developed their own integrations with popular software options that their target customers are most likely to use.

To learn more about Pipedrive or other CRMs with robust business app integrations, check out our CRM review page.

[Jump back to table of contents.]

Chapter 8: Selecting the Right CRM Software

There are dozens of CRM platforms on the market, each with their own strengths and weaknesses. Hopefully, this ebook has given you a good overview of what to look for and how the various features can benefit your sales team.

When choosing the right CRM for your business, you'll want to gather input from your sales, marketing, and service teams before making a final selection. It's also important to review and research the requirements your company's CRM needs as well as things that are nice to have but not mission-critical.

After reviewing the features, costs, and upgrade capabilities of a variety of CRMs, narrow it down to a handful that meet your requirements. Most CRM vendors offer free trials so be sure to sign up for a few of these to get initial impressions.

Once you've settled on a choice, request a demo with the company to do a deep dive into the software. The upfront time investment will be well worth it in the long run to make sure you purchase the best solution for your needs.

When you're ready to roll out your new CRM, check out our article that walks you through how to complete a CRM implementation with a minimum of fuss.

Jump back to table of contents.

Chapter 9:
Creating a CRM Strategy

A CRM strategy outlines a company's plan to use CRM software to help grow sales and improve customer service. It incorporates an overall business strategy with input from sales, marketing, and customer service, identifying all potential touchpoints that occur during the customer journey.

Here's an overview of seven important steps to keep in mind, but be sure check out our full article on developing a CRM strategy for an in-depth look at the process.

1. **Review your overall business strategy.** This includes answering key questions like where, what, who and how you will operate in your market. These answers help form the backbone of your sales strategy.
2. **Map the customer journey.** This encompasses your operations, marketing, sales, service, and support teams and looking at any touchpoints they have with a prospect or customer. Equipping your team with the right software will ensure they're prepared to go wherever the customer journey may take them.
3. **Establish sales channels and processes.** Take a look at your product and customers determine what your sales process looks like and how it will integrate with your CRM strategy.
4. **Consider organizational dynamics.** Whether implementing a CRM for the first time or switching to another platform, you'll need to know who will have access to the CRM and understand how the change may affect your team. Give them a voice in this process and they will be more likely to embrace the new technology.
5. **Define team goals**. To evaluate the performance of your team, set goals for each group — such as sales — that will be using the CRM. These goals should tie in with your overall business objectives. Knowing these goals will not only set employee expectations, but they will also inform the requirements needed for the CRM.
6. **Define the components of your CRM.** This step includes defining contacts, creating pipelines and deal stages, identifying requirements, and selecting any additional software necessary for a successful sales team.

Jump back to table of contents.

Creating a CRM strategy is crucial to grow a company's sales and improve customer service. Although sales will be the primary users of the software, other departments such as marketing and service should also be included in the conversations during the process as the use of a CRM will affect all customer touch points from website experience to demo follow up to knowledge base articles.

Jump back to table of contents.

Chapter 10: Implementing CRM Software

Customer relationship management software implementation is the process of setting up and running CRM software. Every major step of a CRM implementation – planning, implementing, integrating, customizing, testing, and training – should link back to your overall business goals. By including your team in these steps from day one, you will set your company up for successful use and adoption of the platform. Be sure to take a look at our complete guide to implementing a CRM for more tips and best practices.

Keep these five steps in mind when you're ready to start your CRM implementation.

1. Develop an Implementation Plan

An implementation plan will ensure you've considered the right foundational steps for a successful CRM implementation. The planning stage involves choosing your implementation team, establishing goals for the system and its use, determining what existing data will need to migrate into the new system and creating a basic timeline.

However, the most important part of this stage is to include all potential users in your discussions to learn what their biggest challenges may be while working with your new CRM. Addressing these issues during the implementation phase dramatically increases the likelihood of a successful CRM rollout.

[Jump back to table of contents.](#)

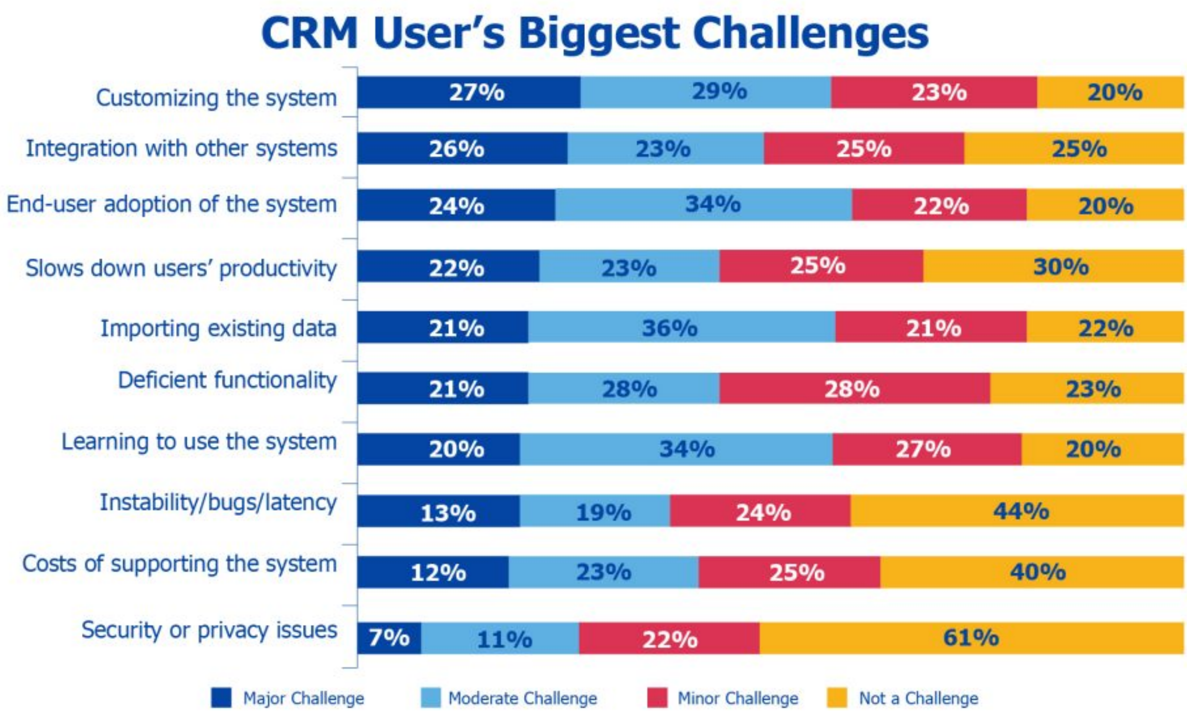
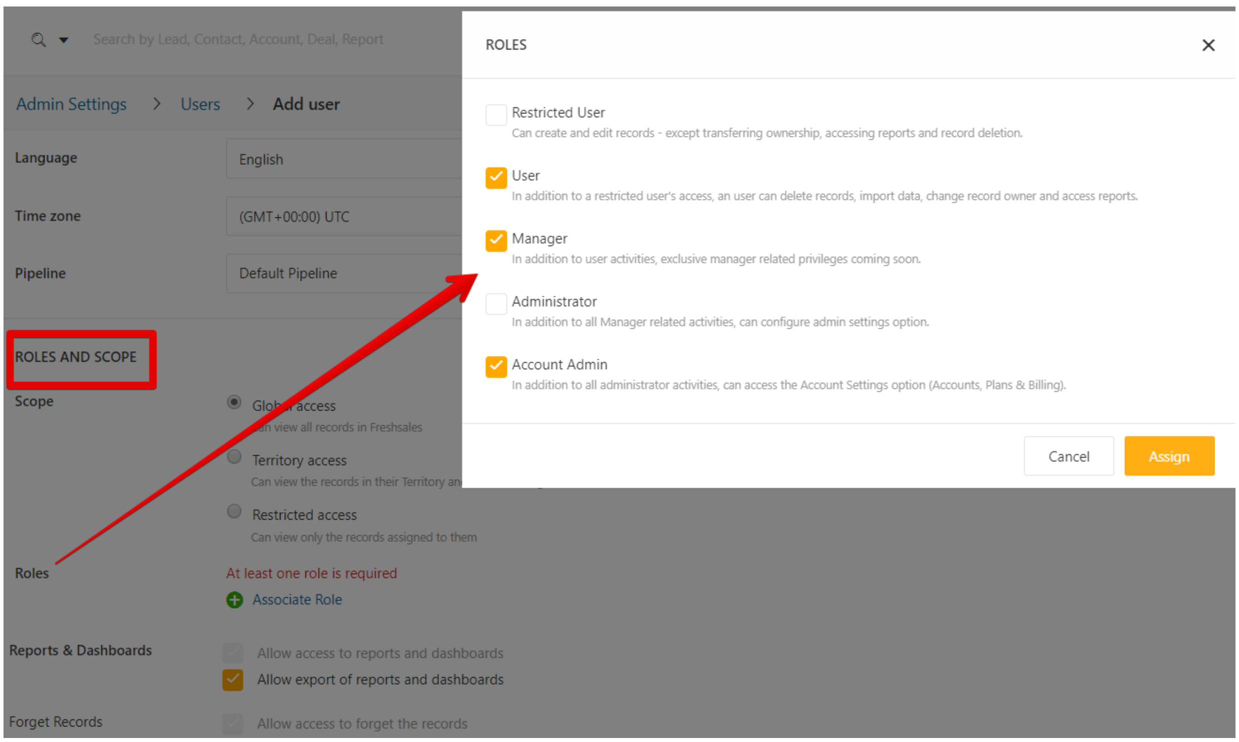


Image courtesy of ***Nextiva***

[Jump back to table of contents.]

2. Establish Your CRM Settings

This step requires you to go through your system settings where you may be asked to define selections for drop-down menus, specify required fields, create sales pipelines, deal stages, or set user permissions. How you go about completing this step will depend on the system you have selected. Fortunately, many CRM will include core features with pre-populated examples for items like contacts and deals. If not, they're easy to create.

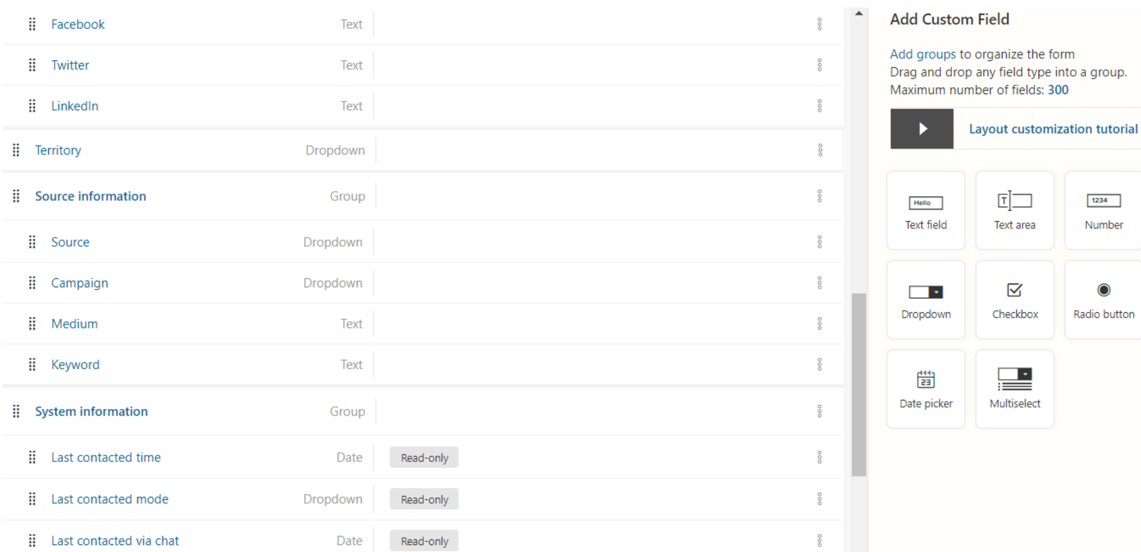


User permission role settings

Jump back to table of contents.

3. Customize Your CRM

Customization allows you to tailor features to your business needs using filters, rules, automation, and lead scoring. These features are designed to help your sales reps become more efficient and your business better communicate with leads and customers. Ultimately, what and how you customize should tie directly back to your overall business goals.

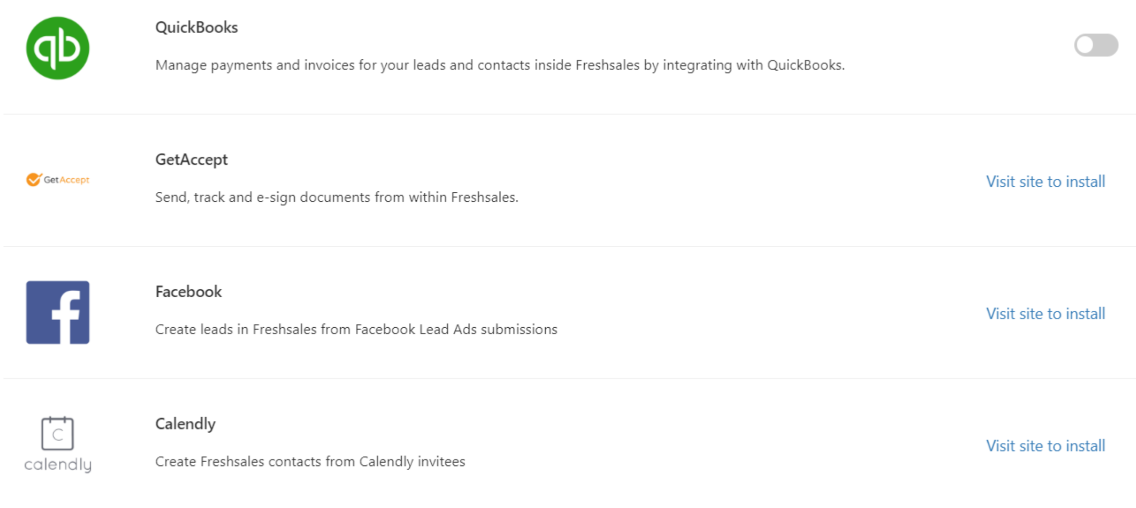


Creating custom contact fields

[Jump back to table of contents.]

4. Integrate With Third-party Applications

Integrating your CRM with third-party applications allows you to maximize your organization's sales and service capabilities and gives you access to additional features not found in your CRM. This may help with data migration, email, social media outreach connection, chat, and any other tools that may impact the way you handle sales and customers.



Connecting to third-party apps

Jump back to table of contents.

5. Test and Train

The final step of your CRM implementation is to test how all of the individual components are working together to help achieve your business goals. Now you're ready to train your employees on how to use the CRM. Because so much of CRM implementation and follow-up training requires meetings and face-to-face interaction, we've created a helpful guide and checklist to walk you through setting up an effective training program for your CRM.

If you're in the market for a new CRM, **Freshsales** is easy to set up, intuitive, and full of customization options. It also has excellent 24×5 email and phone support included with all plans should you need help with implementation or using any of the many features. Visit Freshsales today to start a free trial.

Bottom Line

Since a CRM is a centralized place to manage all of your sales leads and customers, most businesses that sell to other businesses (B2B) will benefit from the ability to keep things organized. Businesses that primarily sell to consumers (B2C) can also take advantage of the ability to organize, qualify, and track customer activity.

Customer relationship management solutions come in dozens of variations and a range of price points. Sales teams can't afford to be without the valuable information they provide, from reporting tools and workflow automation to agent performance tracking.

**Images courtesy of Pipedrive, Freshsales, Salesforce, and Nextiva.*

Jump back to table of contents.

Glossary of CRM terms

Account: an umbrella category that houses several different contacts within it. For example, Walgreens might be the name of an account. Ryan Foley, Marketing Director, and Jennifer Ayden, CMO, might be the contacts *within* the account.

Activities: Calls, emails, attempted calls, voicemail, or any interaction with customers that a sales rep engages in. Logging activities is essential; they give you a permanent living record of your business's history with every customer. For businesses with a sales team, activities serve as "marking territory" so that a sales rep knows not to reach out to a customer who already has activities logged with another rep.

Closed/won: A deal has been won, or closed, when what began as a lead is now officially a paying customer. CRMs are useful for tracking likely closing percentages for leads. If a sales rep has five deals in the opportunity stage, management will be able to predict the likely closing percentage and strategize how to move more deals or move deals faster through the pipeline.

Dashboard: A homepage that displays pertinent information. Different types of users will have different dashboards; a sales rep's dashboard will most likely display their own numbers and where they are with their quota. The dashboard for a VP of Sales would probably display the entire sales team's numbers.

Fields/custom Fields: Slots where employees enter information about a contact or account. For example, if a bulk file of inbound leads is being uploaded into the CRM, they'd have fields such as "name," "title," "company," and "email address," which would be automatically filled after the upload. Many CRMs allow you to create customized fields to capture information specific to your sales process.

Forecast: Sales forecasts are projected future numbers and goals for your company to hit in order to be profitable. CRMs include forecasting features that pull past and current data and activity to predict future success.

[Jump back to table of contents.]

Lead: A contact that has entered your sales funnel, which your sales team will nurture in the hope that they will become a customer.

Opportunity: An opportunity is opened when you make meaningful contact with a customer: the customer has agreed to a meeting, or you've had the opportunity to pitch them. Price quotes or proposals have been exchanged.

Pipeline: The pipeline is the collection of stages each opportunity moves through in the sales process.

Prospect: A prospect is a lead that is a good fit for the product being sold, someone who has expressed interest in the product. A lead becomes a prospect when the lead has been qualified — meaning it's been determined that that lead would be a good fit and that they're interested in the product.

Sales funnel: A representation of the stages of the journey your potential customers go through before making a purchasing decision. Someone who's "high funnel" is not yet ready to buy, whereas someone who's "low funnel" is nearly ready to make a decision.

Sales process: The sales process refers to the steps taken to close deals. CRM aims to streamline and improve each step taken to win customers. A stable sales process is one that is repeatable and keeps the customer top-of-mind.

Tasks: Tasks are reminders that keep your team organized. For example, when a sales rep cold calls a customer and doesn't make contact, they can immediately set a task that reminds them to follow up in a week. A week later, that task will be sent as a reminder for the rep to call again.