



A comprehensive introduction to

CRM

Customer Relationship
Management Software

About the

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Jess has over 15 years of experience in business and sales technology. She uses her expertise to answer your questions about CRM software and other valuable sales tools.

This e-book is part of a [larger series on CRM.](#)

Visit us at: fitsmallbusiness.com

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INTRODUCTION

Customer relationship management (CRM) software is a system that businesses use to **manage and improve their lead interactions and relationships with leads, prospects, and customers**. It is generally equipped with tools for contact management, sales automation, reporting, and productivity.

This allows them to offer consistent service when they interact with 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 ebook can help you every step of the way.**



HIGHER PRODUCTIVITY
& SALES



BETTER COLLABORATION



EASIER ACCESS TO
INFORMATION



IMPROVED CUSTOMER
SATISFACTION RATE

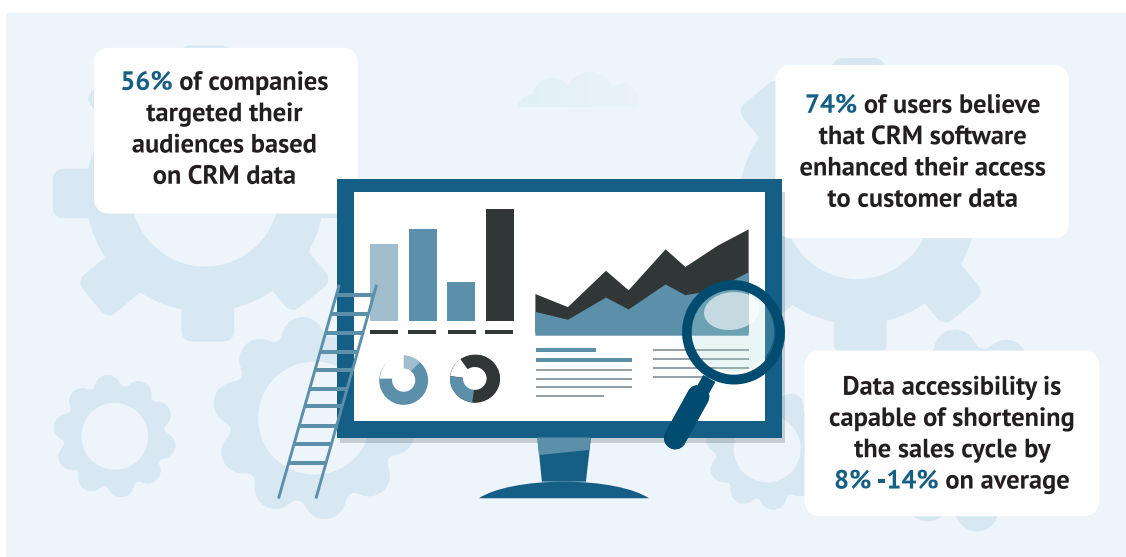


DATA-BASED DECISION
MAKING

CHAPTER 1

What is a CRM?

“ Instead of cluttered cabinets full of files and fragmented information, CRMs serve as a living record of important business information. ”







DATA SOURCES | Salesforce | Ringlead | Nucleus Research

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Before the advent of CRM software, salespeople used spreadsheets, contact sheets, and stacks of business cards to track and manage leads. 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 they may have never otherwise have noticed.

Learn more about CRM software in [our comprehensive guide](#).

When **choosing a CRM**, determine the type you need based on several factors. Consider factors like the size of your team, your company’s budget, ease-of-use, the level of customization you need, and the extent of data access by third-party vendors. Take a look at the types of CRM technologies below to see which one best fits your business needs.

CRM	Best Features	What It Does	Price
 freshsales	Built-in phone	Manage and make sales calls without leaving the CRM	Free to \$69 per user, per month
 Zoho CRM	Service desk tool	Publish content, monitor customer engagement, and track interactions on social channels	Free to \$52 per user, per month
 Really Simple Systems	Project management	Document and organize customers’ help desk interactions right in the CRM	Free to \$46 per user, per month
 salesforce	Advanced analytics	Monitor key business metrics with prebuilt reports and customized dashboards	\$35 per user, per month

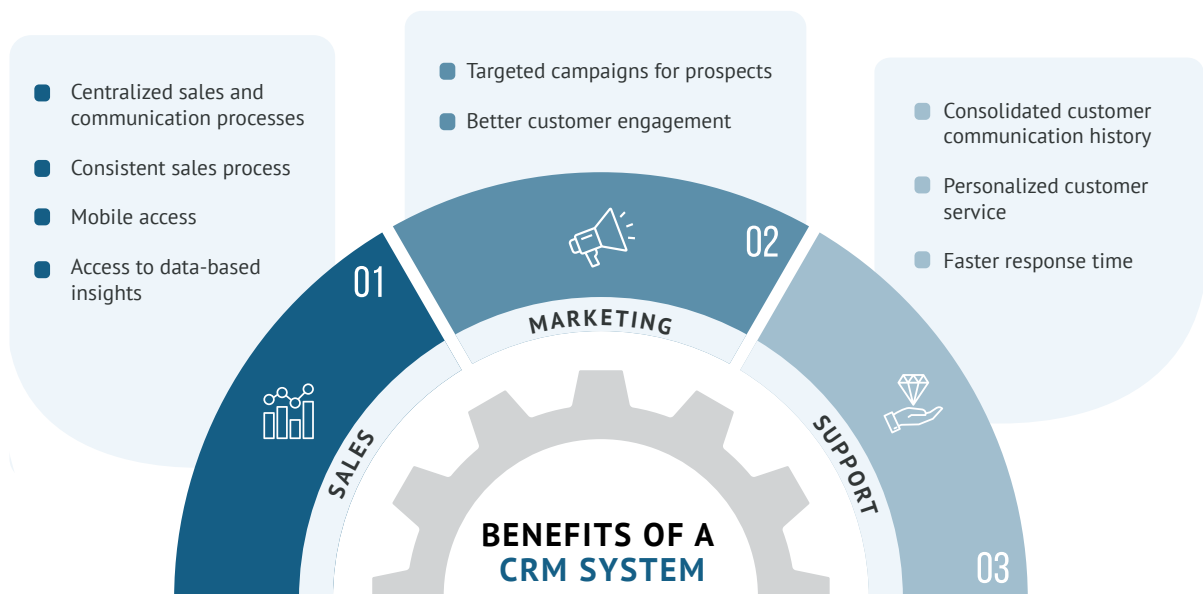
CHAPTER 2

The Business Value & Benefits of CRMs

BENEFITS OF USING A CRM

The benefits of using a CRM include a **simplified sales process, improved team productivity, and increased sales**. CRM benefits are seen through a combination of CRM features, human efforts, and positive customer responses. Adopting a CRM also empowers your sales, marketing, and support teams to collaborate and provide the best service possible to customers.

9 KEY CRM BENEFITS FOR SALES, MARKETING, & CUSTOMER SUPPORT



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CRMs Promote a More Consistent Sales Process

Many CRMs include automation features that establish a consistent, repeatable process of your sales cycle and workflows. Standardizing the [sales process](#) enables your team to anticipate the next action in an ongoing deal.

For example, a workflow rule for lead nurturing could pertain to when a sales rep sees buying signals, such as a lead clicking on an email call to action. The CRM then automatically sends an email to the lead from the sales rep offering to schedule a [product demo](#).

Provides Insights & Analytics for Better Decision-Making

Many CRMs allow you to store and analyze data and produce essential [CRM reports](#) to uncover customer behavioral patterns and sales trends. Use this information to anticipate your customers' needs and take action at the right time or find out which sales tactics are most effective or why certain deals were unsuccessful.

For example, a sales manager sees a CRM report showing a 67% success rate in closing a deal when a proposal is sent after eight touchpoints. The same report shows that deals fall through when they don't get in touch with a client in three days. Based on these figures, the sales manager implements specific schedules for client calls and proposals in a bid to close more deals.

Creates Better Targeted Marketing Campaigns

Using a CRM helps you determine the best sources of leads and prospects so you can focus on the campaigns that give you the biggest return on

your investment. Based on CRM records of sales interactions, your marketing reps gain better insight into your prospects' interests and create more targeted and relevant content.

Allows You to Offer Personalized Customer Service

CRMs provide your support team with consistent, real-time customers data, including their interactions with your sales and marketing teams. Access to this information helps your support reps deliver excellent and [personalized customer service](#).

For instance, if you notice several customers are having the same issue using a product, have your customer service team offer a live webinar and create and publish a knowledge base guide on how to do it efficiently.

Supports Long-term Customer Engagement

CRMs store a wealth of customer data your marketing team can leverage in the relationship nurturing process. This data can include pricing concerns, preferred communication channels, and personal interests. As a result, marketers can create personalized campaigns, ads, and forms that help prospects move through the sales funnel and become brand advocates over time.

This establishes brand loyalty and turns your customers into brand champions, making them more likely to give your product positive reviews and recommendations. Word-of-mouth referrals from your advocates are free and an excellent source of additional revenue.

CRM BENEFITS STATISTICS

Using a CRM helps you streamline customer interactions and collaborate with team members. That's why **91%** of companies with 10 or more employees use a CRM to manage their sales, marketing, and customer service functions.

82% of teams are using CRM reporting features to make sales-related decisions, such as tracking individual and team performance.



75% of decision-makers say the COVID-19 pandemic encouraged them to embrace sales technology like CRM platforms.

With **81%** of CRM users using multiple devices to access their CRM, choosing a CRM with a robust mobile app is essential to get the maximum benefit from your software.

SOURCES: Customer Relationship Management Market Size, Share & Trends Analysis Report By Solution (Customer Service, Customer Experience Management), By Deployment, By Enterprise Size, By End Use, And Segment Forecasts, 2021 - 2028
The Ultimate List of CRM Statistics for 2022
Every eCommerce Business Should Use a CRM – 5 Reasons Why

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CHAPTER 3

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 low-cost solutions are basic 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.

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.

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

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

Internet

The most popular CRM solutions are hosted in the cloud and require a stable internet connection to access them.

Cell Phone Plans

Many CRMs offer companion mobile apps so sales agents can access the system from their smartphones while away from their desk or on business travel.

Monthly or Yearly Subscription Fees

Providers that offer cloud-hosted CRMs typically charge monthly or yearly fees in exchange for system management and maintenance.

Training

Employees need **CRM training** to get the most out of it. Costs of employee 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.**

Companies wanting a CRM with superior features that are 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 \$15 to \$69 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.

Visit Freshsales Now

Learn more about the types of CRMs available on the market, pricing options, and specific product suggestions in our full article about **CRM pricing models**.

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 different [CRM features and options](#) can be overwhelming, so here's a look at CRM features that matter most.

- [Contact Management](#)
- [Account Management](#)
- [Reporting & Dashboards](#)
- [Sales Automation](#)
- [Customer Database](#)
- [Lead Management](#)
- [Email Marketing](#)
- [Sales Forecasting](#)
- **Document Management**
- **Cross-platform Capability**
- [Customizations](#)
- [Integrations](#)

Contact Management

Contact management features allow you to create, store, track, and organize information about your prospects, leads, and customers. Details include names, addresses, contact numbers, social media accounts, and company details. While you can use a simple spreadsheet to store the information, a CRM system makes it easier for multiple users or departments to access them at any time.

Account Management

Account management tools focus on nurturing client relationships, retaining business, and developing opportunities. Incorporating account management features in a CRM enables you to manage multiple contacts and define accounts and territories. It also helps you calculate the potential value of each business account.

Reporting & Dashboards

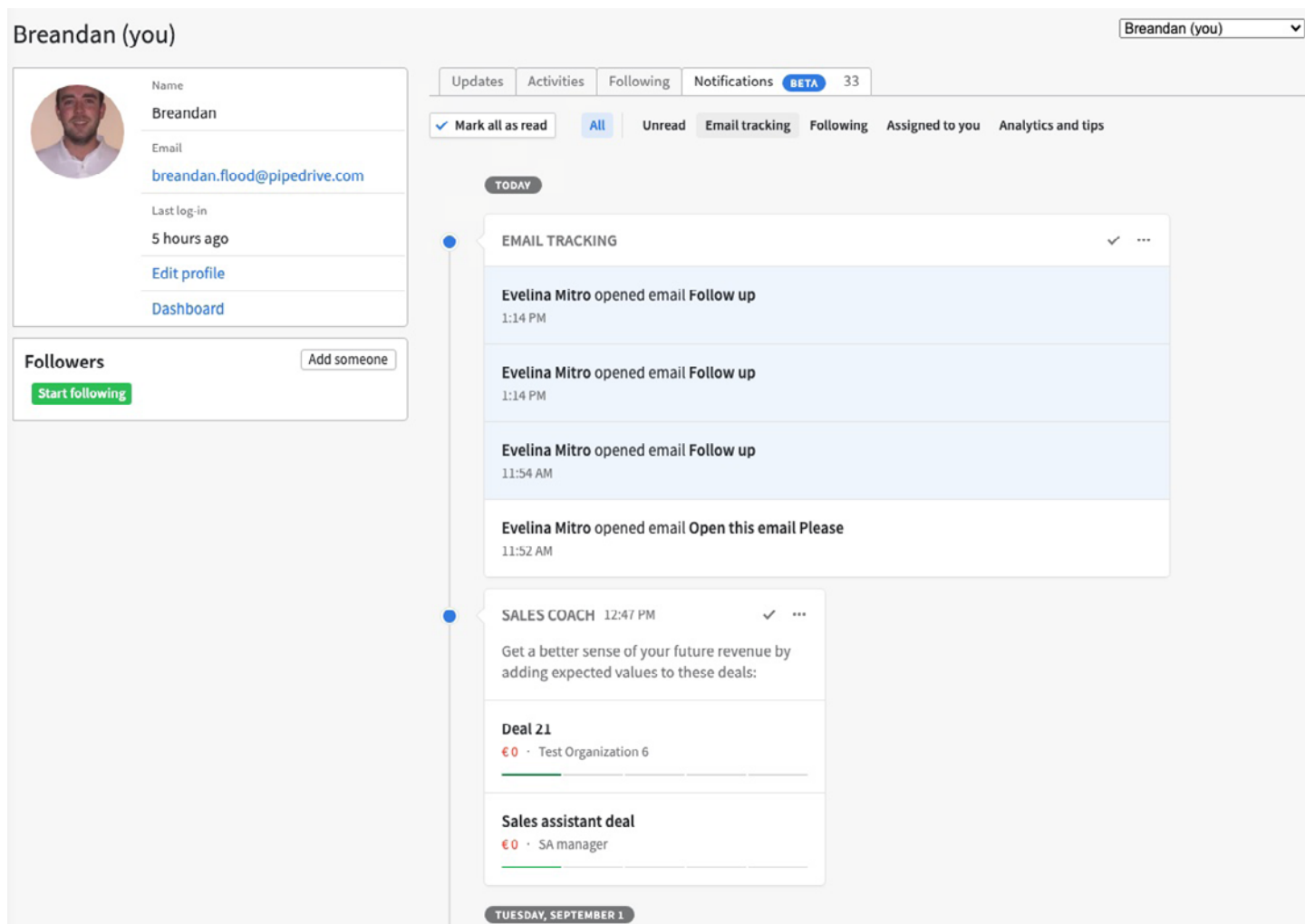
CRM reports and dashboards provide users with the data and metrics they need to strengthen customer relationships. They include an overview of sales activities, new leads, sales pipelines, and key performance indicators (KPIs). These data are presented through visualization tools, such as charts and graphs.

CRM reporting tools help you make more business decisions based on reliable, real-time data. This data helps spot business trends and identify your company's strengths and weaknesses. In addition, you can use compiled data to track your marketing campaigns and determine at which touchpoints your customers are most engaged.

Sales Automation

Sales automation eliminates manual and repetitive steps in the sales process to close deals faster. You can automate tasks, including appointment scheduling, sending personalized emails, workflows, pipeline management, and follow-up

activities. Automating the sales process increases your team’s productivity, ensures no responsibility falls through the cracks, and improves customer satisfaction by reducing response times.



Sales Automation in *Pipedrive* (Source: fitsmallbusiness.com)

Customer Database

A customer database helps businesses organize meaningful customer data and manage interactions. It allows you to access sales and marketing data from a single place while streamlining data search, storage, import, and export. The content of this database includes your customer's personal information, the source of leads, points of contact with the customer, purchase history, and levels of engagement.

Lead Management

Lead management is the systematic process of capturing leads (potential customers), monitoring their activities and behavior, distributing them to sales reps, **qualifying them**, and nurturing them with the right amount of attention to convert them into business opportunities.

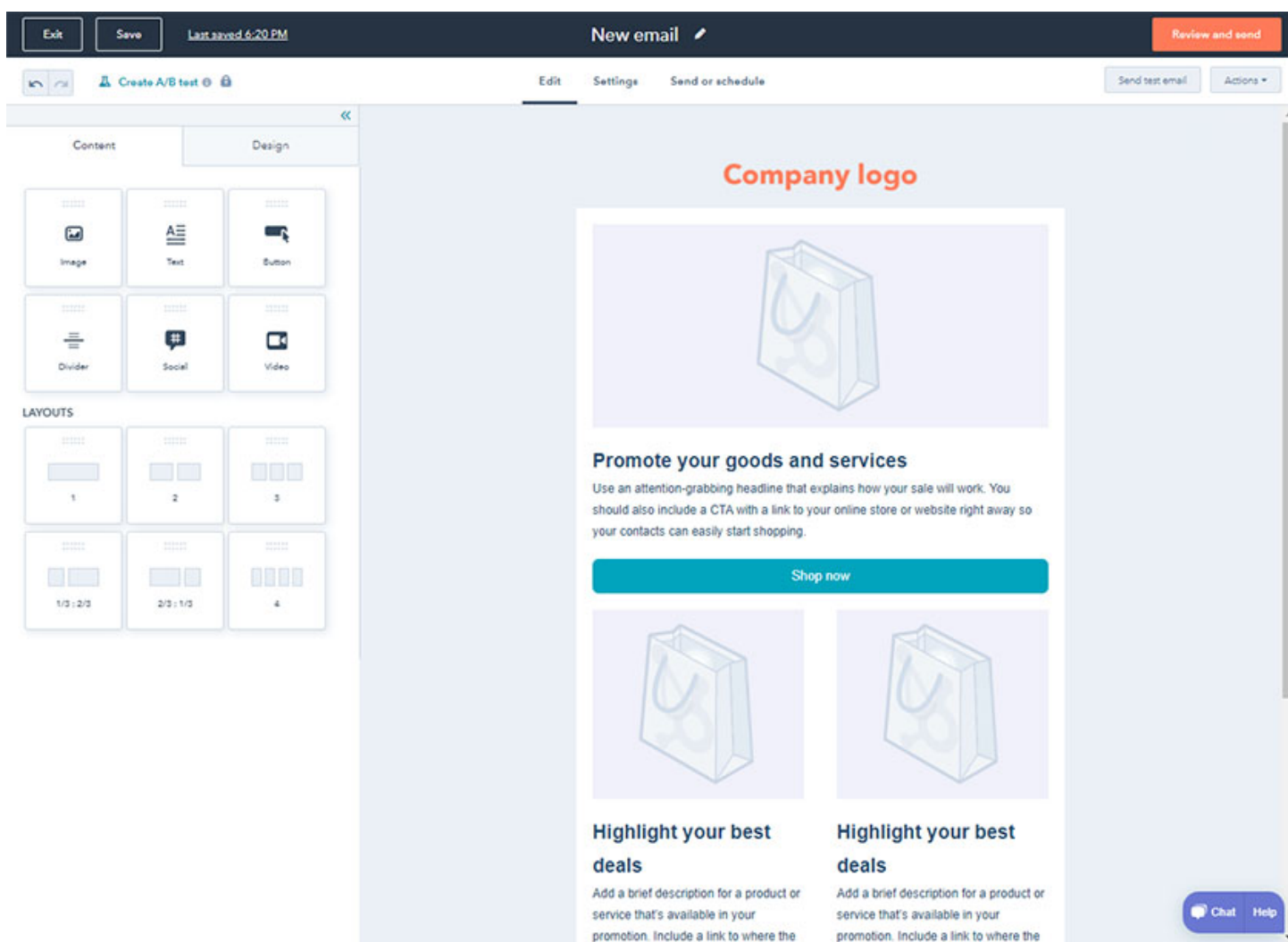
STAGES OF LEAD MANAGEMENT



Email Marketing

A CRM with email marketing capabilities allows you to send individual or mass emails to your leads and customers within your CRM system. It also offers email templates, email automation, and

email campaign monitoring features. The emails sent out are personalized based on the customer data gathered by your CRM and their position in the sales funnel. This creates better customer engagement and drives higher profits.



*HubSpot CRM email campaign customizer
(Source: fitsmallbusiness.com)*

Sales Forecasting

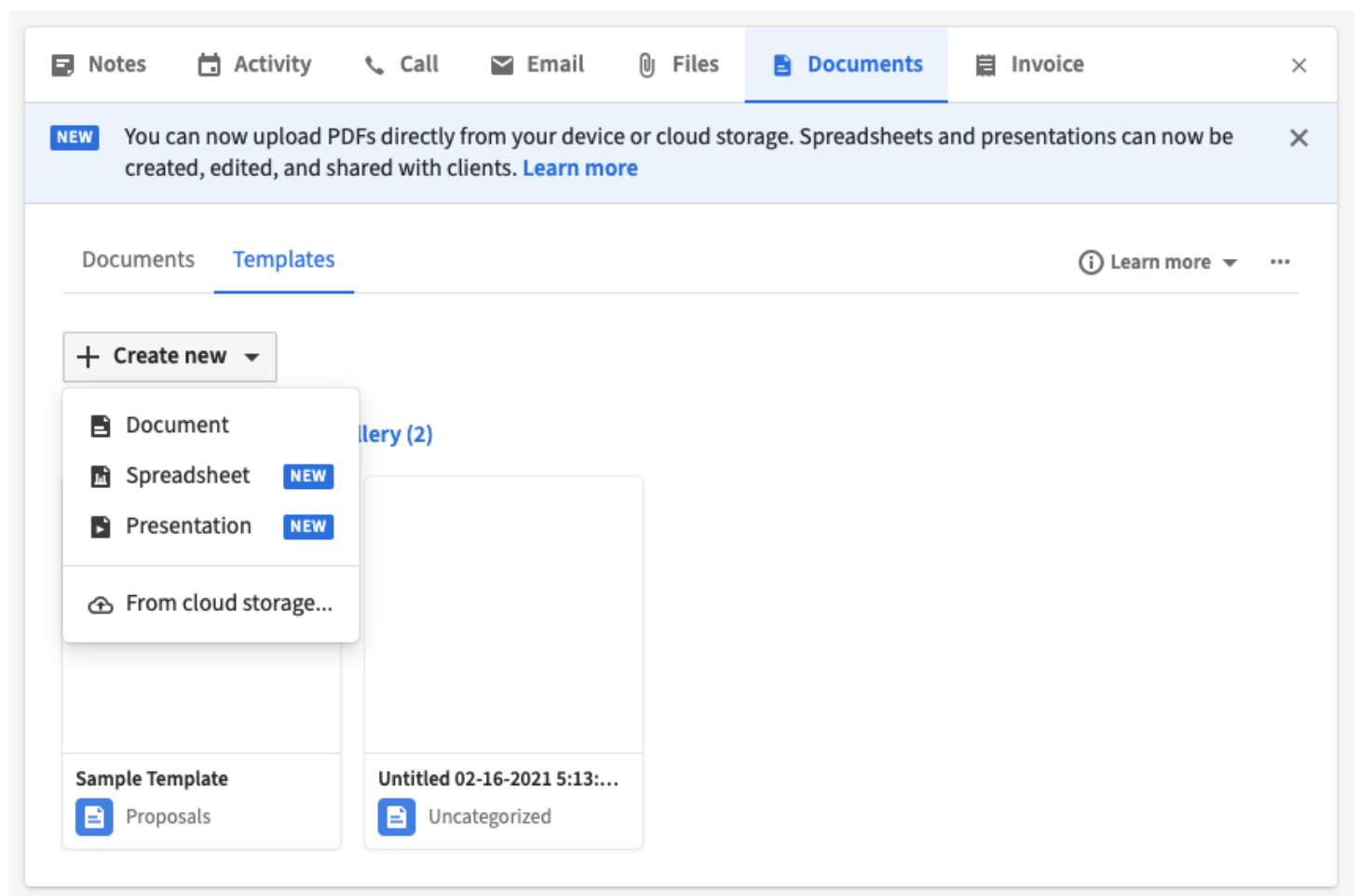
A sales forecast predicts when deals are likely to close on a weekly, monthly, quarterly, or annual basis. Most modern CRM companies leverage **artificial intelligence (AI)** to comb through massive amounts of data and create recommendations and predictions based on the available information.

For example, Freshsales has an AI-powered assistant called Freddy Insights that recognizes patterns in customer behavior and sales trends. It

generates revenue forecasts and gives suggestions on how you can best communicate with your leads and customers.

Document Management

Document management features help you capture, track, and share electronic documents. These include proposals, contracts, and digital scans of your business files. This feature also allows team members to access documents from one location without exiting the CRM.



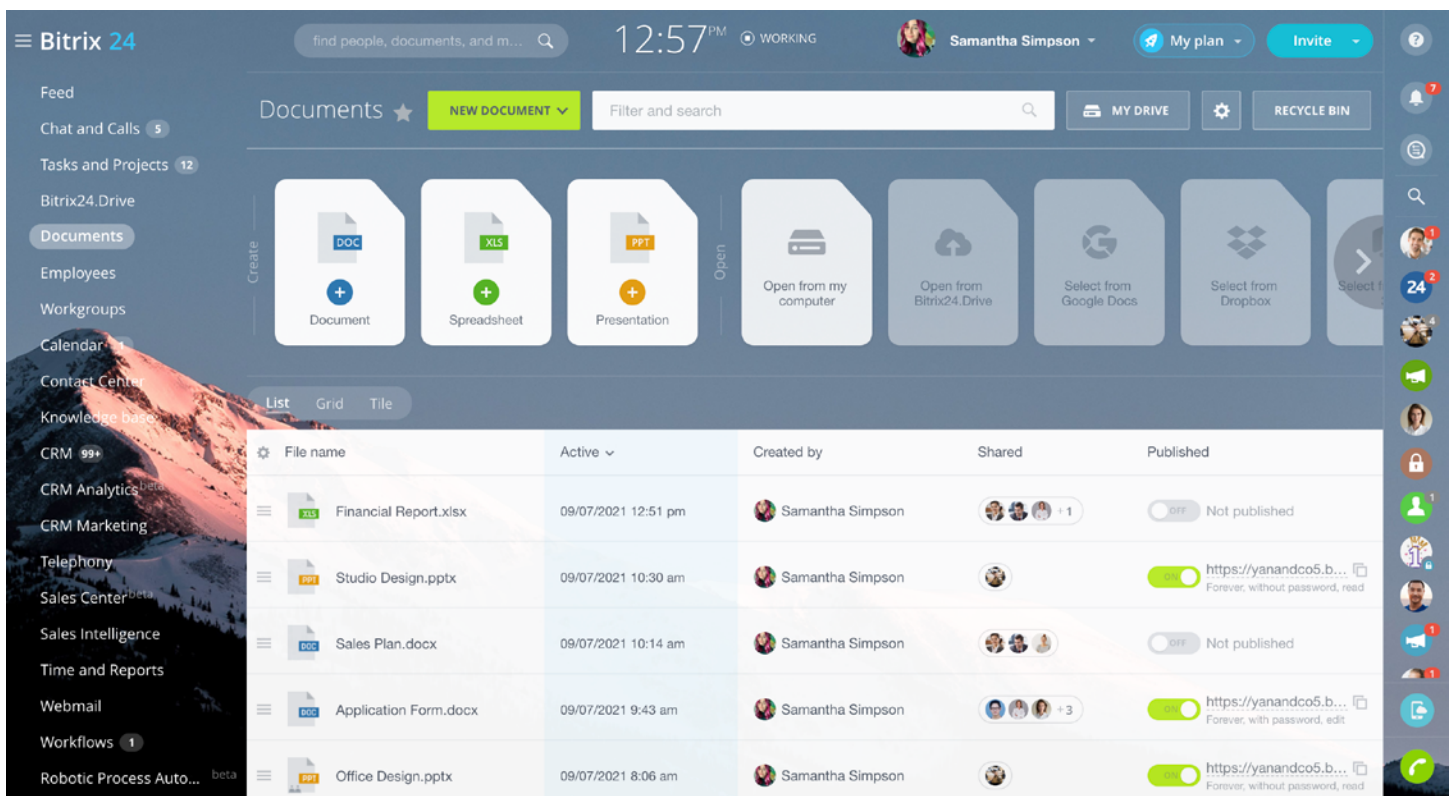
Pipedrive's Smart Docs feature helps you manage, track, and share documents. (Source: [Pipedrive](#))

Cross-platform Capability

Cross-platform compatibility is essential because most businesses run their devices on various operating systems. That’s why it’s best to choose cloud-based CRMs that support several operating systems, including Windows and macOS. The availability of iOS and Android apps is also key, especially for sales teams with remote and field workers who need to access their CRM from mobile devices.

Customizations

Most CRM software allows you to add new or alter existing features to make the program a better fit for your business needs. Customization also covers sales and marketing tools or modules you can turn on and off, depending on your specific business needs.

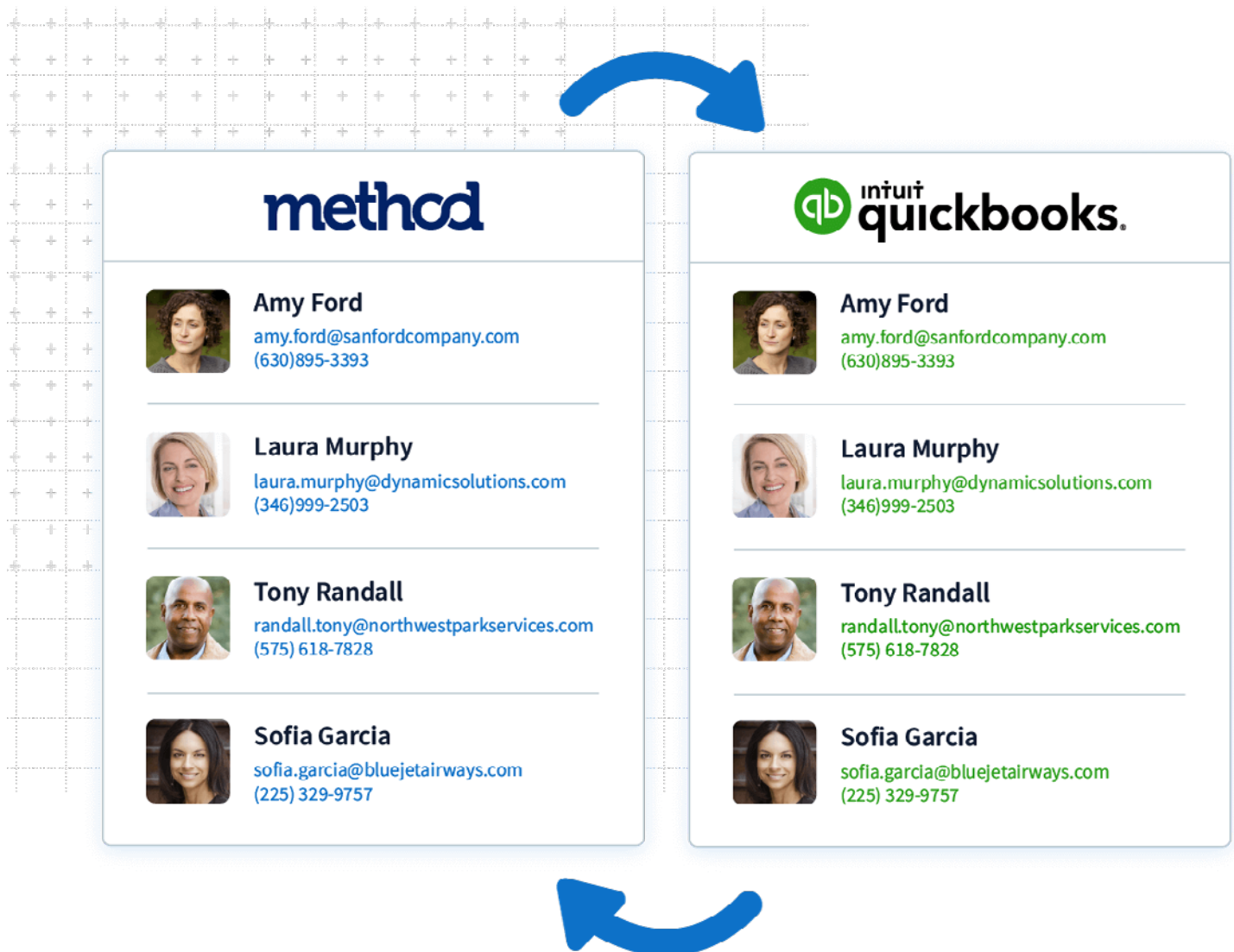


Bitrix24's customizable contact management features (Source: fitsmallbusiness.com)

Integrations

A **CRM integration** is the seamless connection between your CRM and third-party software. These connections extend the capabilities of your CRM software and allow you to address gaps in its features. For example, when you integrate your

CRM with **Trello**, any changes you make in one app are automatically updated in the other one. Some CRM solutions allow you to integrate dozens of apps, while others have limitations to the number of integrations.



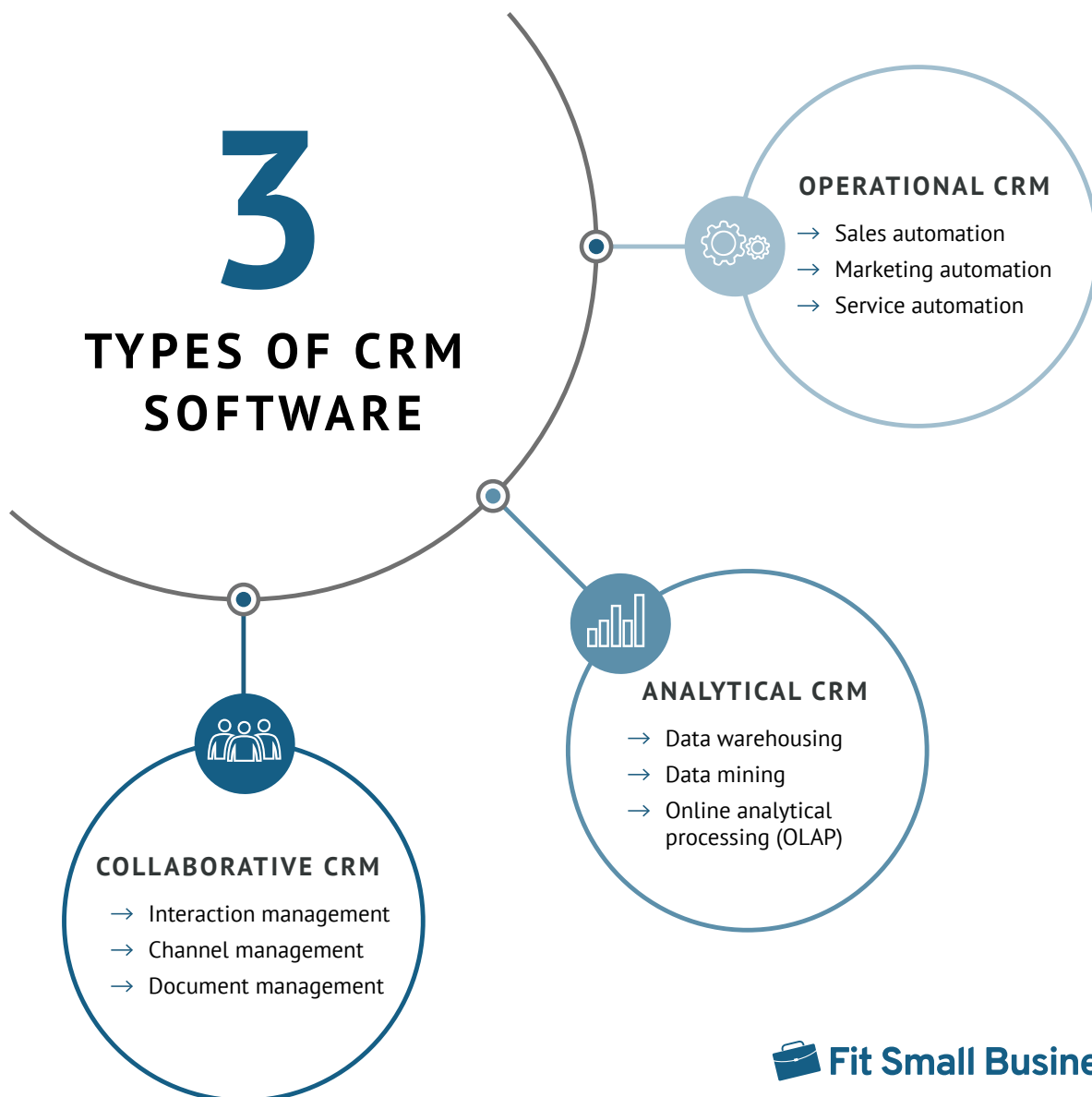
Method:CRM QuickBooks Integration
(Source: fitsmallbusiness.com)

CHAPTER 5

Types of CRM

There are many [types of CRM software](#), differentiated by features created for specific job roles or functions. CRM solutions generally fall into

three fundamental types: Operational, Analytical, and Collaborative.



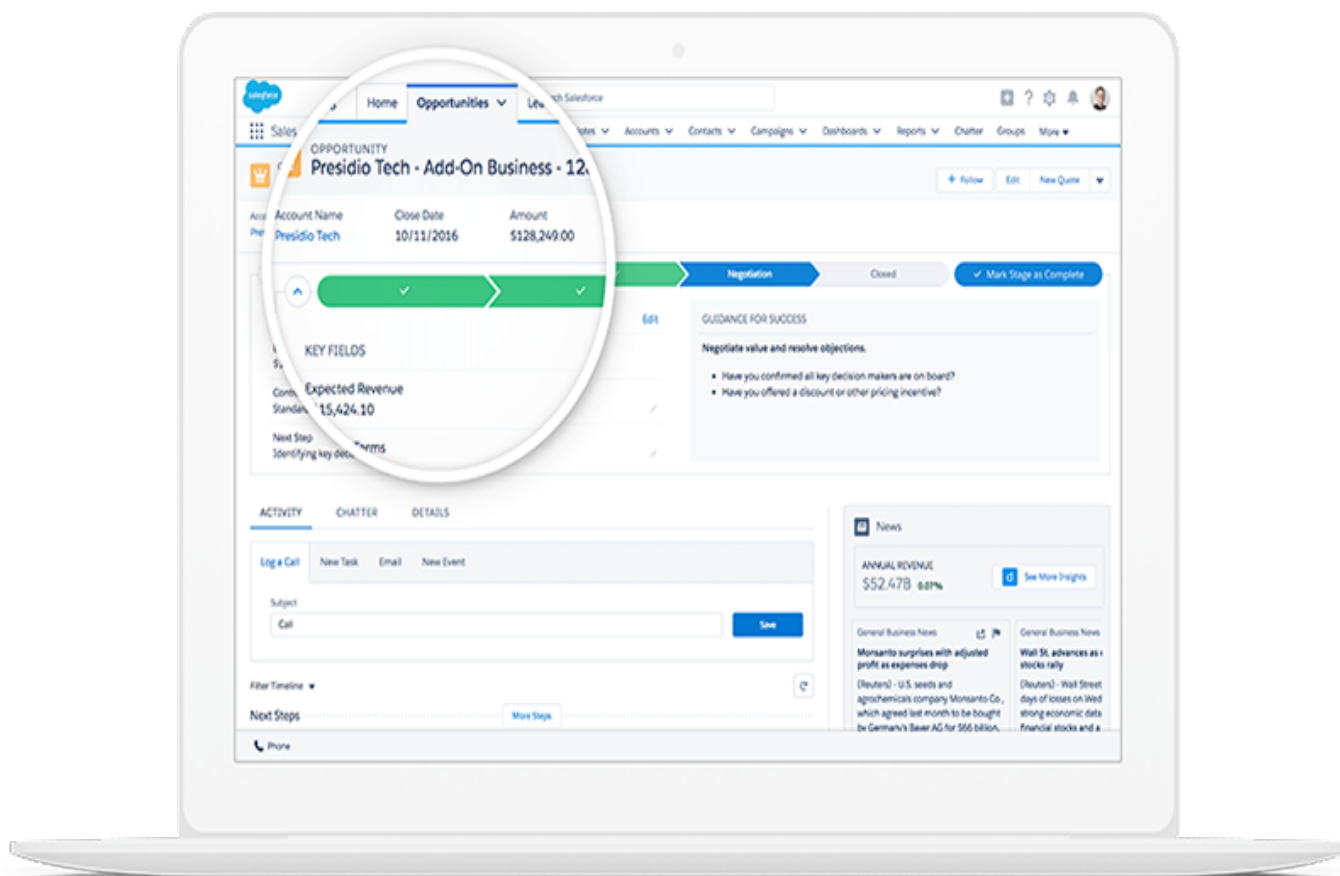
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Operational CRM

An operational CRM **manages your interactions with your prospects and customers to help you acquire new customers and retain existing ones.** This type of CRM generates leads, convert leads into customers, and serve customers. In addition, it allows you to facilitate accounting, inventory, project, and human resource functions from a single system. The core features of an operational CRM include **sales automation, marketing automation, and service automation.**

Operational CRMs are best for:

- Sales professionals needing to manage pipeline stages and perform sales activities like appointments and quotes
- Teams that execute and track marketing campaigns and link them to leads and contacts
- Sales professionals and business managers who need to manage post-sale projects for the products they are selling
- Businesses that coordinate and execute inbound or outbound calling within their CRM



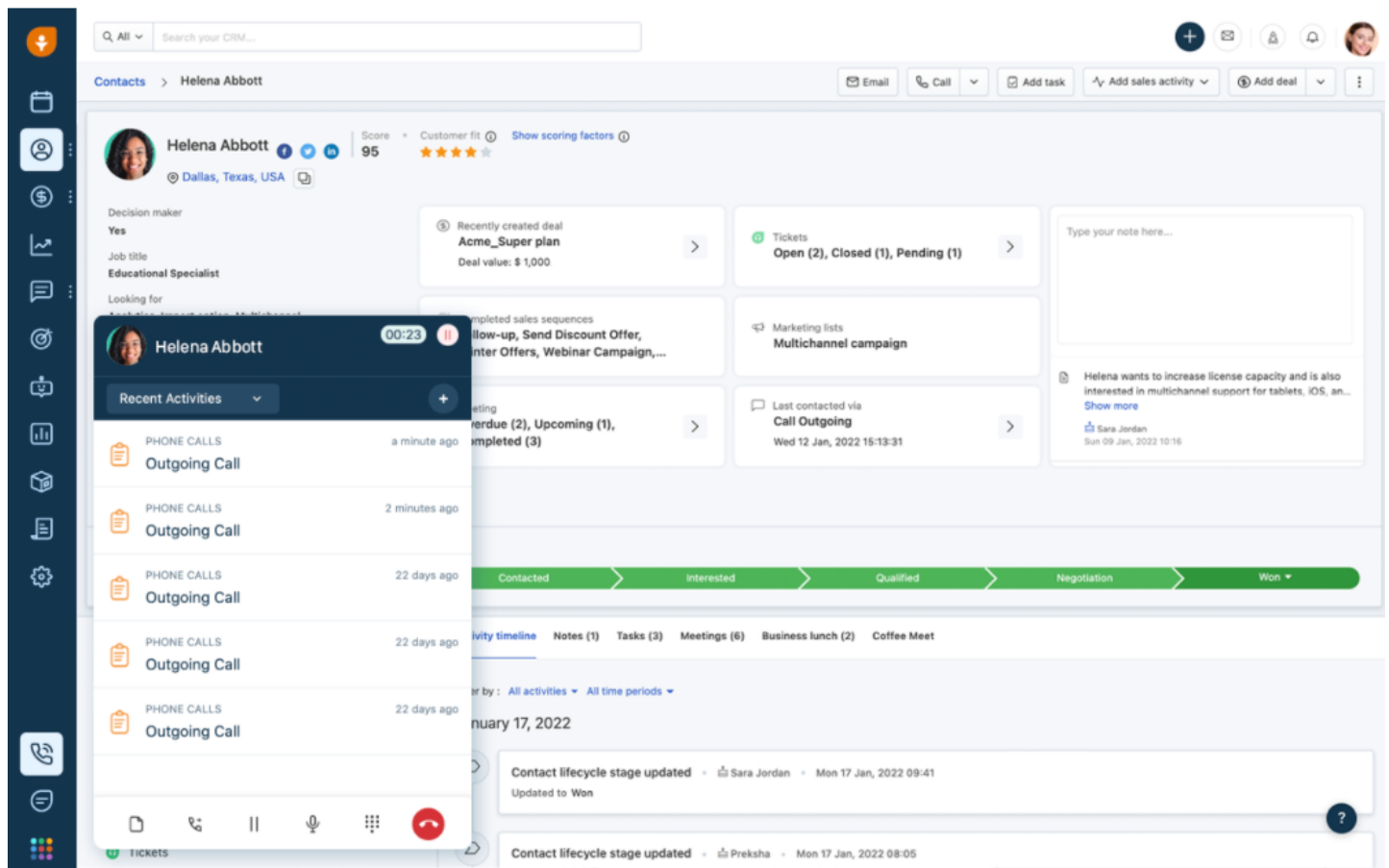
Salesforce Essentials' opportunity management tab (Source: Salesforce Essentials)

Collaborative CRM

Collaborative CRMs make cross-team communication and collaboration systems more efficient, **improving customer satisfaction, brand loyalty, and company profitability**. It covers sales, marketing, customer service, and technical support teams, as well as customers, creditors, vendors, suppliers, and distributors. This type of CRM also uses automation to accomplish its goals.

Collaborative CRM systems are best for:

- Businesses with multiple locations or departments that heavily depend on cross-team communication
- Teams that need to track customers across multiple channels, especially on the digital side
- Companies that want to gain a better understanding of their customers and increase customer retention and loyalty



Freshsales multi-channel engagement capability. (Source: Freshworks)

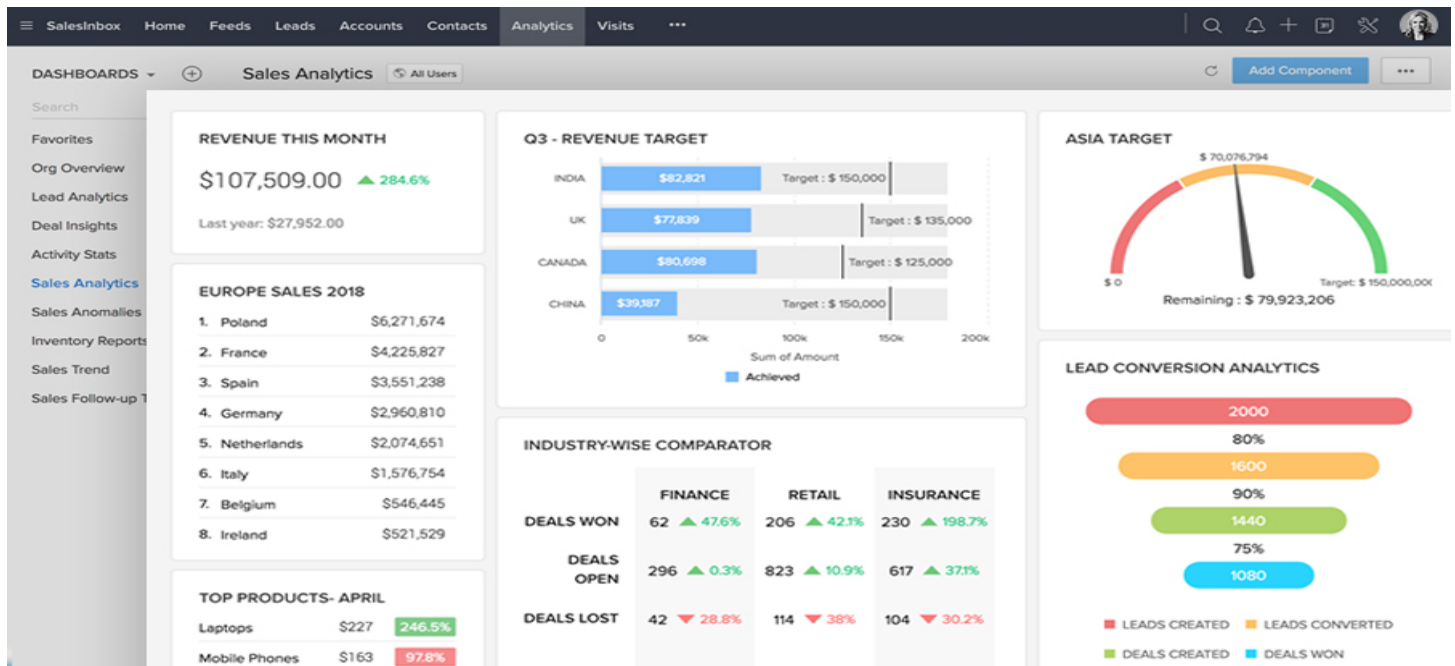
Analytical CRM

An analytical CRM collects, organizes, and analyzes sales, marketing, and customer service data to provide insights and detailed reports you can use to make business decisions. The primary features of an analytical CRM include data warehousing, data mining, and online analytical processing (OLAP).

Analytical CRM systems are best for:

- Managers who need information like performance metrics and dashboards for making data-driven decisions

- Data analysts who monitor customer service efforts and make recommendations based on customer data
- Accountants who need a centralized data storage for their referrals, leads, partners, and clients
- Business intelligence professionals who analyze sales metrics and trends, and use these data to formulate sales forecasts



Zoho CRM's advanced reporting dashboard. (Source: Zoho CRM)

CHAPTER 6

Industry-specific CRMs

General-purpose CRMs include core features like contact management, opportunity management, and lead management functionality to offer a 360-degree view of customers. **Industry-specific CRMs offer more niche and specialized tools to help particular business types, including insurance,**

healthcare, real estate, and hospitality, move customers and prospects through sales cycles more quickly.

Let's explore the differences and use cases for general use vs industry-specific CRMs.

Industry-specific CRM vs General-purpose CRM



- Built to serve a specific industry in mind; hence, features are niche and specialized
- Limited integrations are usually needed, since fundamental features are already included
- Usually more expensive or offers custom pricing



- Offers universal sales, marketing, and customer service features that encompasses all business industries
- Integratable with an extensive pool of third-party apps
- Offers a wide range of pricing options—from very cheap to enterprise-level pricing

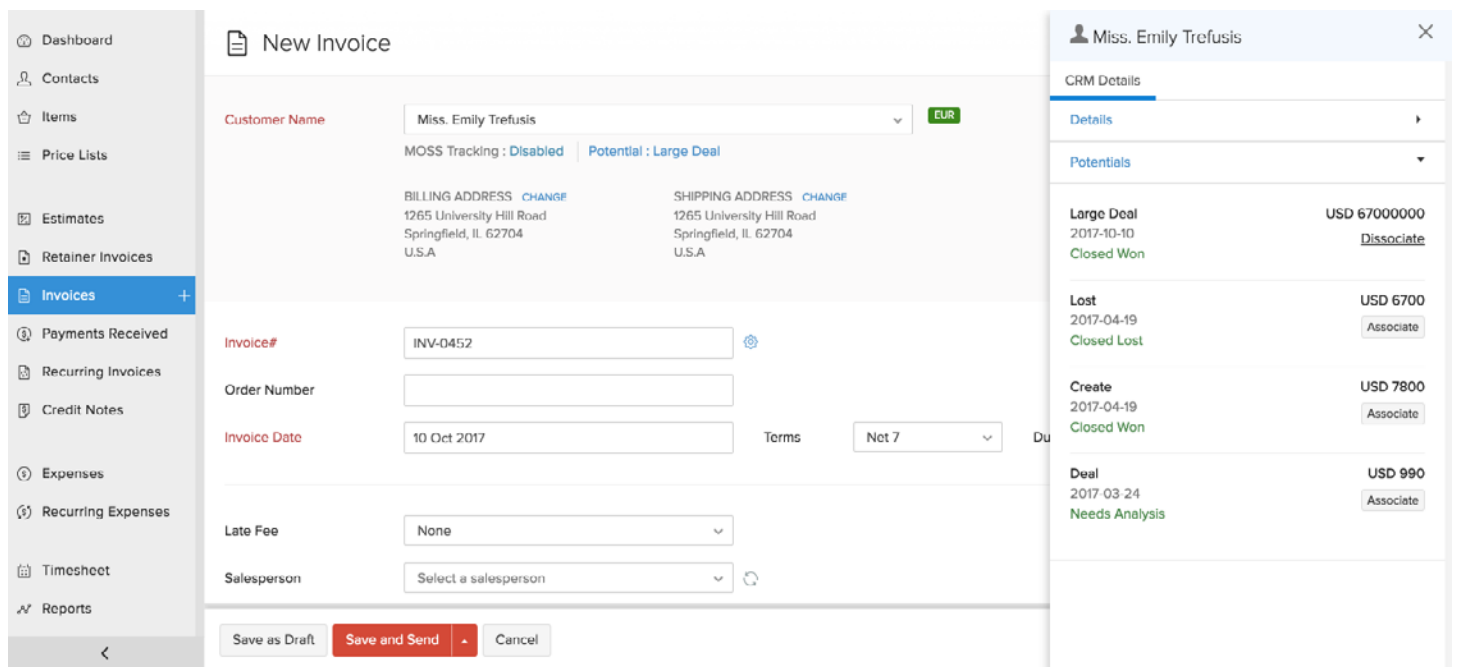
CRMs for Specialized Industries

- Accounting

CRMs for accounting professionals are designed to help **accountants, bookkeepers, and finance staff manage invoicing and billing in a centralized platform**. Fundamental features include invoice creation, payment processing, tax computations, access to open balances, subscription management,

payment reminders, and financial report generation.

Zoho CRM provides features helpful for accountants and bookkeepers. It has tools that enable users to generate quotes, invoices, and purchase orders.

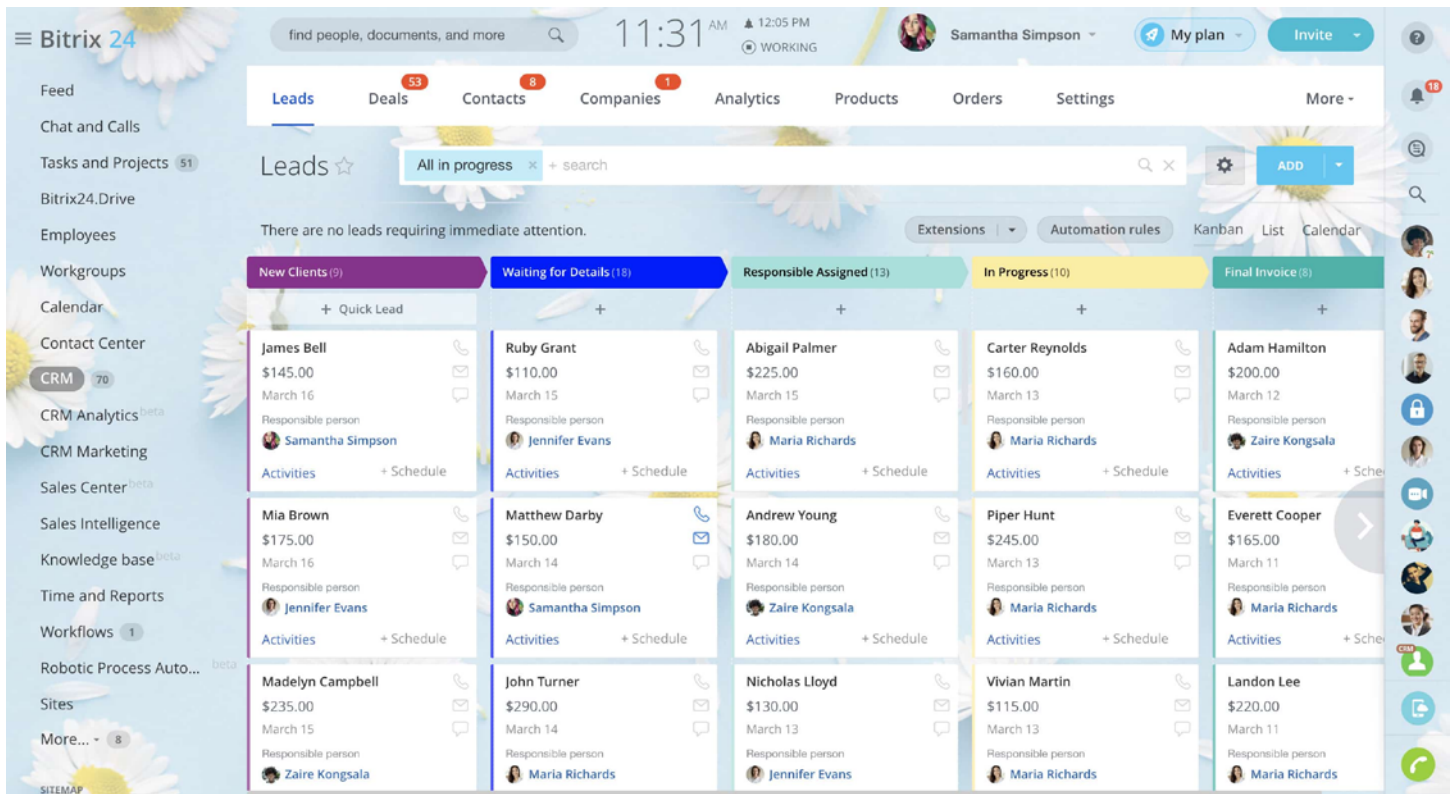


Zoho CRM's invoice generation feature lets users easily create and send invoices directly from the platform. (Source: Zoho CRM)

• Property Management

CRMs for property management make it easy for **landlords and property management firms to manage multiple properties in their portfolio, as well as their occupants and tenants.** Essential features include payment collection, lease contract management, and **lead generation** for finding potential residents.

Bitrix24 offers property management professionals an all-around solution to manage their various properties and leads. Its features include recurring invoices for rental payments and document management tools that generate, file, and track lease contracts.

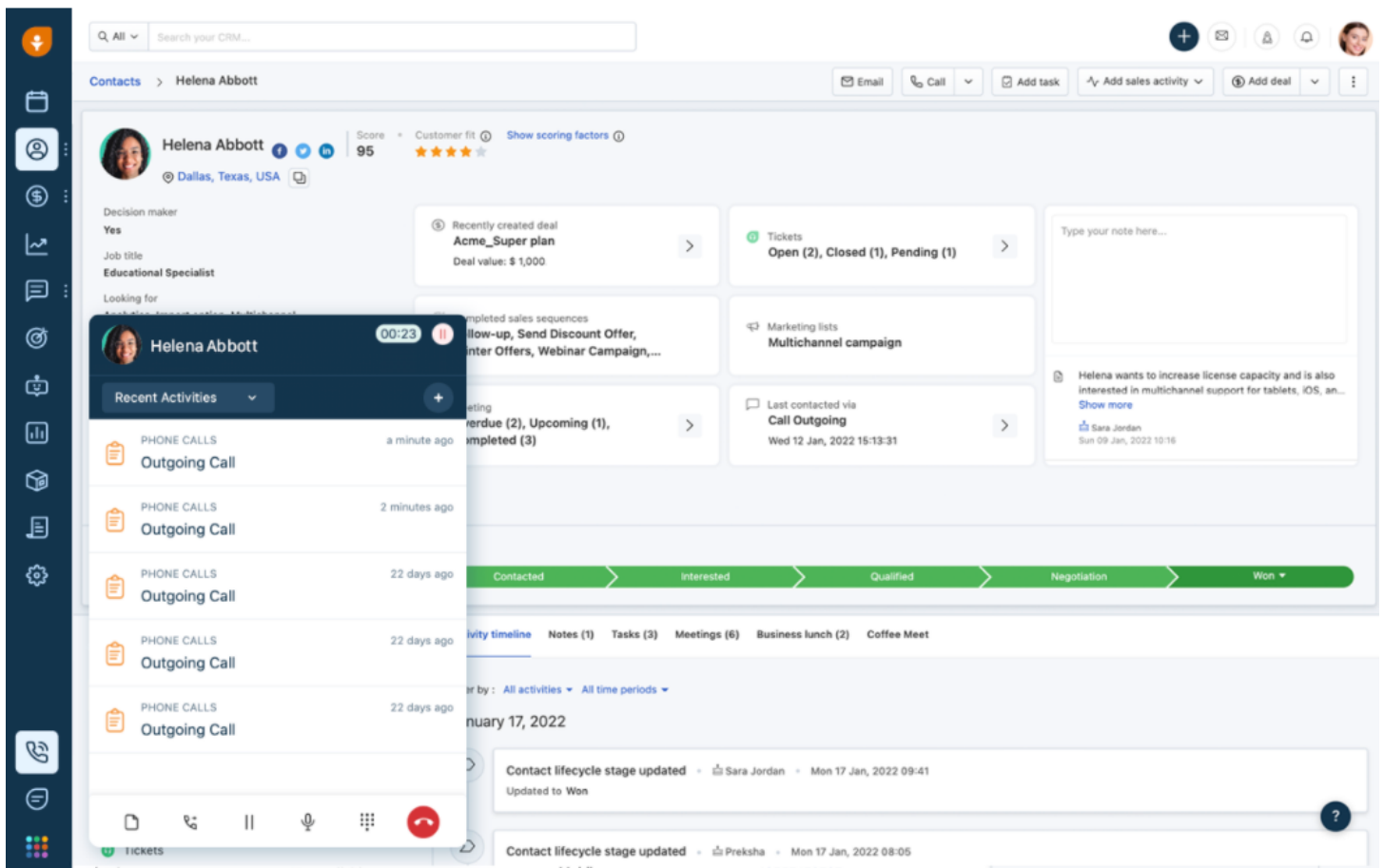


Bitrix24's document management tools allow users to save lease contract drafts in the software. (Source: Bitrix24)

• Call Centers

CRMs for the call center industry offer telephony functionalities for tracking and making business calls, as well as tools for contact and lead management. Essential features include **VoIP-level in-app calling, call recording and routing, workflow automation, contact management, contact profile enrichment, and call analytics and reports.**

Freshsales is an intuitive CRM with cloud-based, call center-specific tools, including a **feature-rich in-app caller, call recording, and call masking.** It allows users to purchase local and toll-free numbers based on their location.

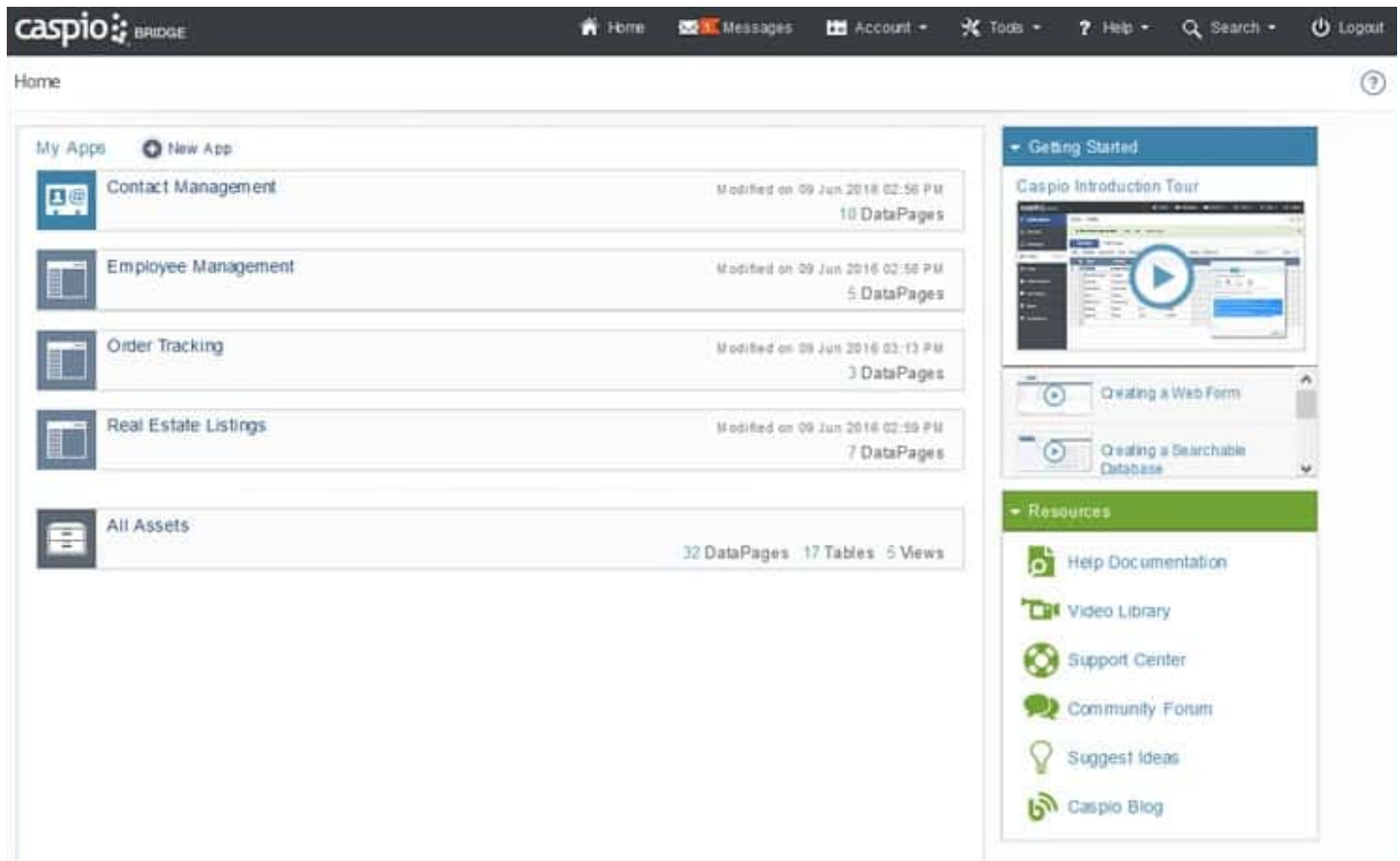


Freshsales' telephone features include an in-app caller, call notes, and analytics. (Source: Freshsales)

- **HIPAA-Compliance**

HIPAA-compliant CRMs adhere to regulations the Health Insurance Portability and Accountability Act of 1996 (HIPAA) put in place to set forth privacy and security standards for those providing health or wellness services. HIPAA-compliant CRMs include tools to **manage healthcare operations, such as patient record management and patient service support.**

Caspio offers HIPAA-compliant database applications that can be made using point-and-click tools and allows users to build a system for medical equipment management and inventory tracking. It also has HIPAA-compliant appointment scheduling and reminder applications.

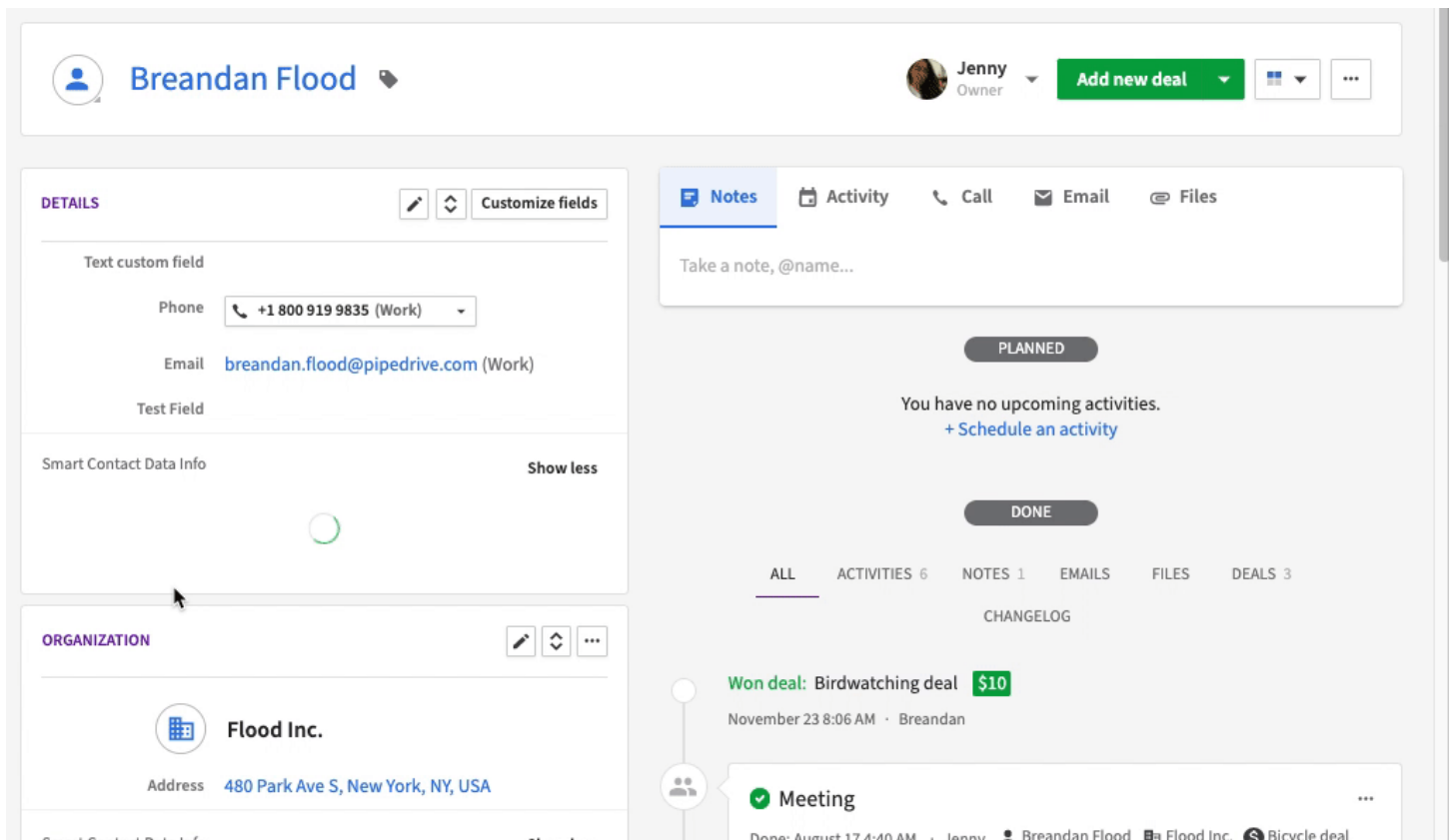


*HIPAA-compliant database applications can be made using point-and-click tools within **Caspio** (Source: Caspio)*

• Real Estate

CRMs made for real estate professionals provide **tools for managing property transactions, generating home-buying leads, and monitoring listings.** It also offers marketing features that allow businesses to market to their leads via email, phone, online advertising, and social media.

Pipedrive, while commonly used as a general-purpose CRM, offers solutions particularly useful for real estate professionals. These include **document management tools, email marketing functionality, and integrations with real estate platforms like Zillow, PropertyRadar, and Trulia.**




Pipedrive's Smart Contact Data feature enables users to gain valuable insight into prospective buyers. (Source: Pipedrive)

• **Construction**

CRMs for construction or contract labor businesses offer tools to manage contract leads, bids, and construction projects. They usually cover general contracting and specialty trades operations, such as **carpentry, demolition, plumbing, electric work, restoration, and welding.**

JobNimbus offers general contractors easy-to-use templates for work estimates and work order conversion, as well tools for proposal building, job-site picture sharing, and e-signatures. It also integrates with QuickBooks for invoicing and payment processing.




Material Order Information
Number: #1004

Materialflow
Material Order Date: 1/16/2015
Job: Sally Smith - 4887 Kit Rd
Estimate: #1003
Status: Draft
Created By: Charles Schnell on 1/16/2015 7:16 PM

MATERIAL ORDER

Professional Services, Inc.
8772 Pleasant Ave.
Dothan, AL, 34062, United States
(888) 278-7287

Sales Representative
Charles Schnell
(888) 278-7287



Job #6 - Sally Smith - 4887 Kit Rd
4887 Kite Rd,
Fallston, MD, 21047, United States

Material Order #	1004
Date	1/16/2015

Item	Description	Quantity
Shingles	Wood	760.00
Pipe Boot Flashing	Replace existing pipe boot flashing.	1.00
Lumber 2x6		20.00
Nails		1,000.00

SPECIAL INSTRUCTIONS


JobNimbus has a work order builder that lets users easily input the details of their construction projects. (Source: JobNimbus)

- Insurance

CRMs made for the insurance industry can be used by insurance agents, brokers, and firms. They include tools to help insurance professionals **prospect and nurture leads, track new deals and goals, and manage policies and plans.** They also logs activities like emails and meeting interactions between agents and their customers into the system.

Radiusbob offers **voice over internet protocol (VoIP)** and call center features in addition to lead and sales management tools. It also features lead and pipeline automation tools, including automated workflows, lead distribution, and relationship nurturing.

The screenshot displays the Radiusbob CRM dashboard. On the left is a dark sidebar with the 'radius' logo and a menu including Dashboard, Leads, Clients, Calendar, Email, Drips, Messages, Links & Files, Carrier Info, Reports, and Settings. The main dashboard area features a search bar and navigation icons at the top. Below are several metric cards: 'Hot Leads' (1), 'Warm Leads' (0), 'Cool Leads' (0), and 'Cold Leads' (0). Further down, there are cards for 'Total Clients' (1) and 'Potential Renewals' (\$0.00). A 'RECENT LEADS' section shows a table with one lead entry.

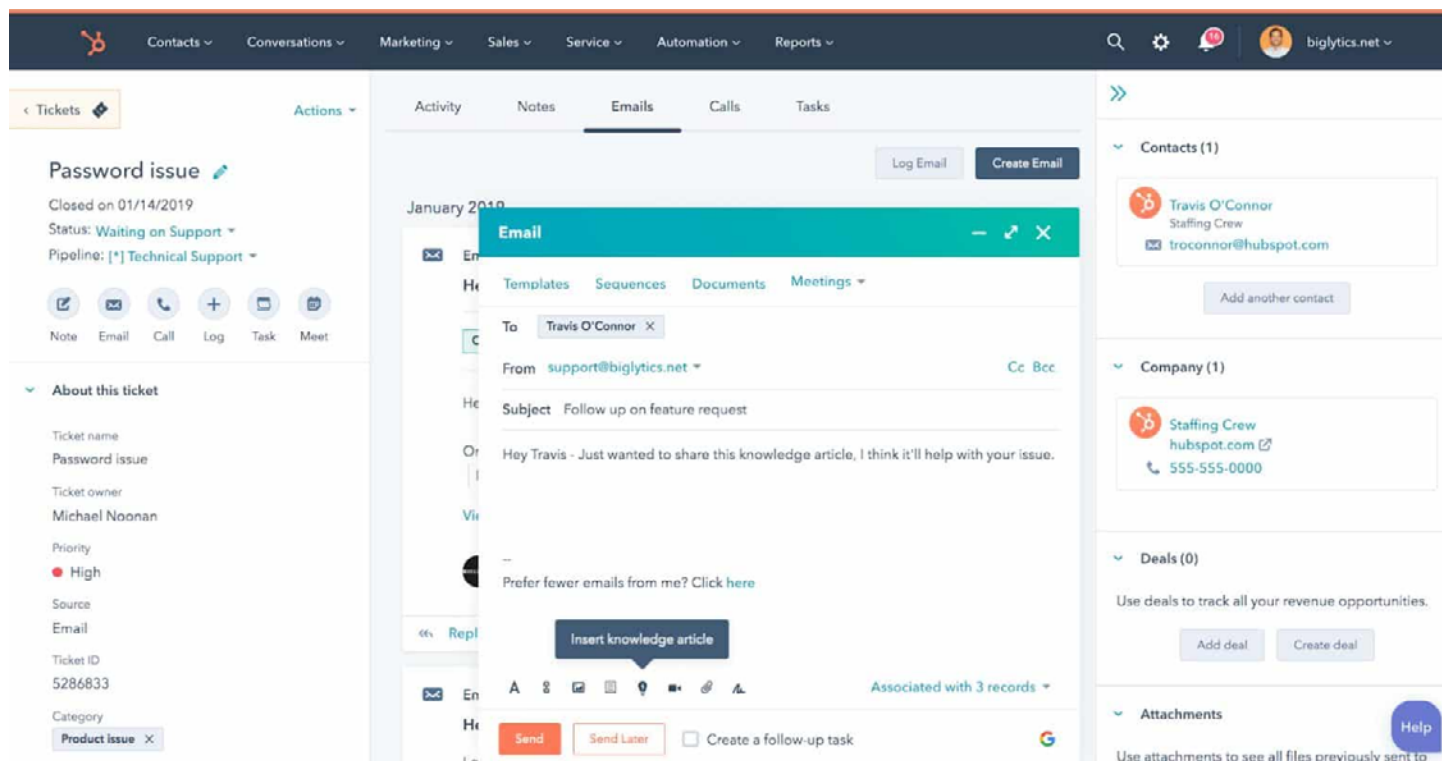
Leads	Address	Contact	Status	Agent	Quicks
 Sample Lead ... Health	123 Sesame Street Tampa, AZ 12345	P: 555-321-4321 C: 555-555-5555 E: test@example.com	New Lead	Jess Pingrey	—

Radiusbob's lead management page displays all pertinent information about a customer, including contact information and past communication logs. (Source: Radiusbob)

• Customer Service

CRMs designed for customer service focus on improving the quality of customer service activities to increase retention and satisfaction. Users can **communicate through multiple channels, build a unified team, and create a centralized database for customer interactions.**

HubSpot Service Hub offers a wide range of customer service tools, such as **chatbots, team email, canned snippets, and email templates.** It provides various customer service-related reports, including tickets closed reports, agent rep productivity reports, and time-to-close reports.

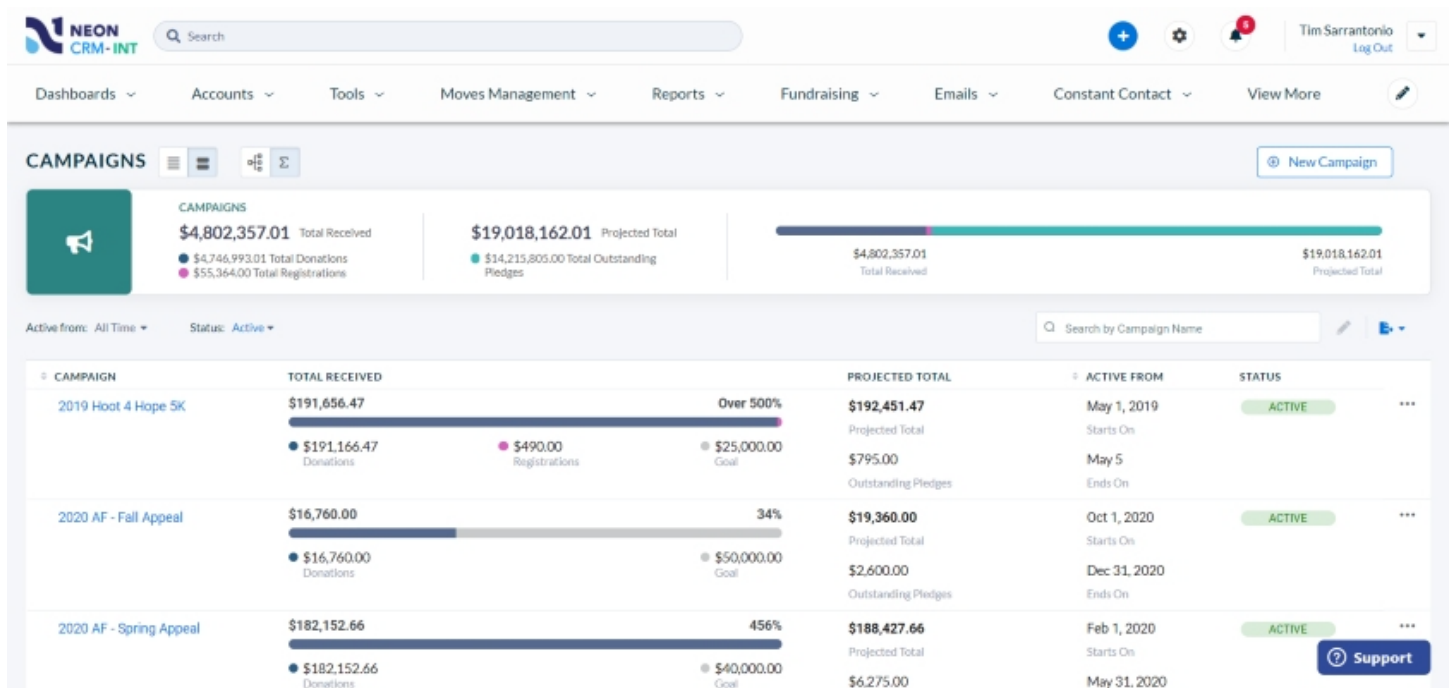


HubSpot Service Hub lets users create tickets from inquiries and complaints sent by the customers, so any agent can easily track its progress and view its history. (Source: HubSpot)

• Nonprofit Organizations

CRMs for nonprofits help charities and non-governmental organizations (NGOs) **raise funds, manage donor campaigns, and build volunteer relationships**. Its common features include a centralized database for contact and donor information, communications history, and financial transactions.

NeonCRM offers **fundraising, donor management, and grant management tools**. It has features for event planning and membership management, as well as tools for reporting and analytics. Its built-in email platform allows users to create and track mass email campaigns to both existing and prospective donors.

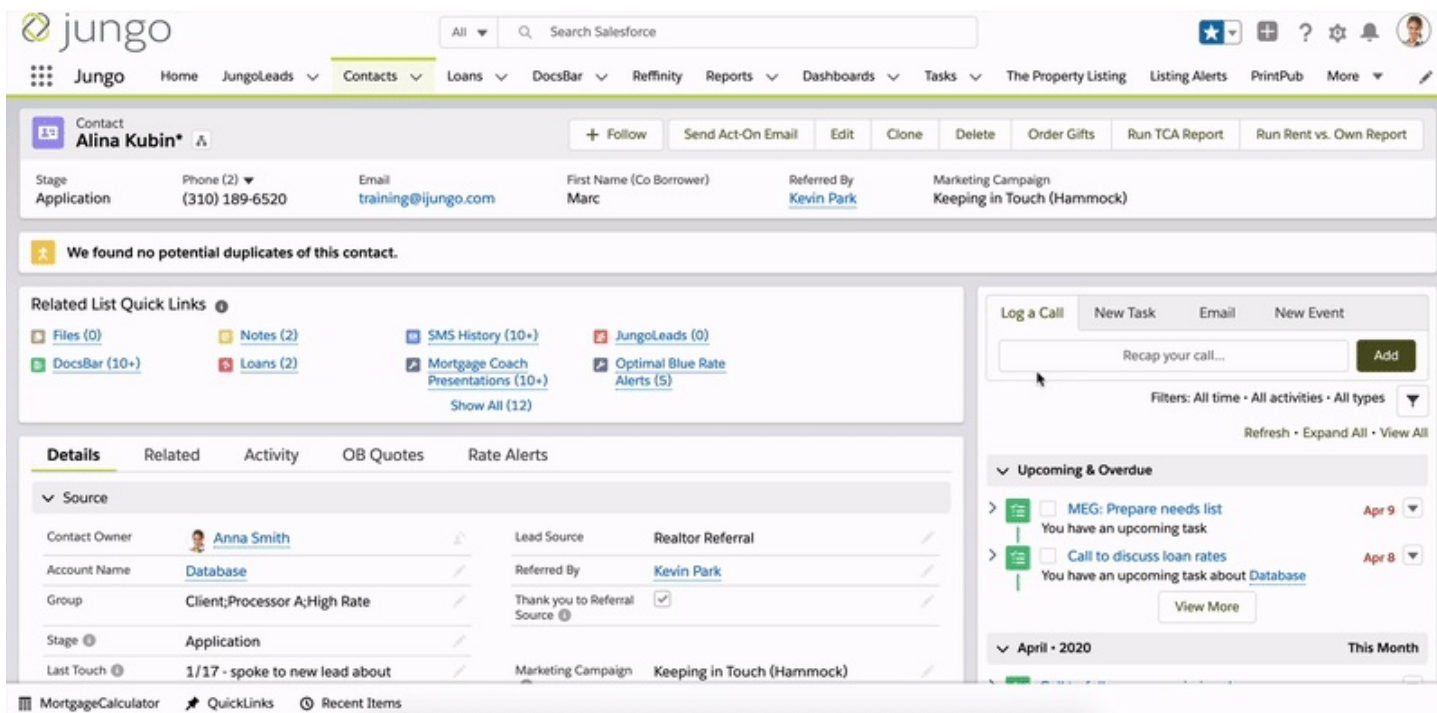


NeonCRM offers helpful fundraising tools that include donation pages and forms, donation tracking, and reporting. (Source: NeonCRM)

• Mortgage Companies

CRMs for businesses in mortgage sales offer a centralized platform to manage broker real estate properties and sell mortgage loans. It includes essential features to help users **generate leads, market their product offerings, and automate clerical tasks.** A robust mortgage CRM should also integrate with various loan origination software (LOS) for managing customer applications.

Jungo integrates with LOS like Encompass, Calyx, and Byte to manage and approve loan applications on the mortgage side. It has a built-in customer review database where brokers can lookup previous successes based on factors like interest rate and date of purchase for mortgage review presentations.



Jungo's lead and contact management page shows all customer-related information, including files, communication history, and existing contracts. (Source: Jungo)

- **Hospitality Companies**

CRMs for hospitality companies, such as restaurants, event planners, and hotels, provide tools to **engage potential customers, schedule reservations or bookings, and manage event-based projects**. It could also include marketing tools to promote sales through promotions or generate leads through online webforms and advertisements.

CaterZen lets users manage delivery services through **driver tracking, delivery schedule reporting, and the ability to obtain orders through a customizable, online ordering interface**.

The screenshot displays the CaterZen online ordering interface. On the left is a sidebar menu with categories: Pick Up Catering, Holiday Buffet Menu, Pick Up Buffet Menu, Box Lunches, Meats By The LB, Sides By The Gallon, Drinks, Desserts, Extras, and View All. The main content area features 'THE CHRISTIE COOKIE TRAY' which serves 12 and requires 3 hours to prepare. The price is \$19.00. Below the item name are fields for 'Quantity' (empty), 'This item is for:' (set to 'Me'), and 'Special instructions' (empty). A red 'ADD TO CART' button is at the bottom. To the right, a 'Your quote' summary shows 15 'Holiday Combo Buffet' items at \$14.95 each and 2 'Gallon of Bar-B-Q Beans' at \$40.00 each, totaling \$304.25. A red 'CHECKOUT' button is next to the total. At the bottom right is a logo for 'First Time ORDERING'.

CaterZen offers online ordering tools to help users easily process and monitor customer orders. (Source: CaterZen)

Check out our useful [guide to industry-specific CRMs](#) for additional information and recommendations.

CHAPTER 7

Business App Integrations for CRM

A **CRM integration** connects your CRM to another app to allow data to flow between them in one or both directions. It improves productivity through workflow automations and by giving you and your team access to the data of both systems in a single platform. A CRM integration can also eliminate the need to toggle back and forth between the two integrated systems.

Most CRMs have tools for **contact management** and helpful features like phone dialers and email or text marketing capabilities. Some providers lock advanced tools behind higher-tier plans, requiring you to pay for more expensive packages with other features your team may not need. CRM integrations address this issue by providing desired functionality through other apps, eliminating the need for your business to pay for unnecessary features.

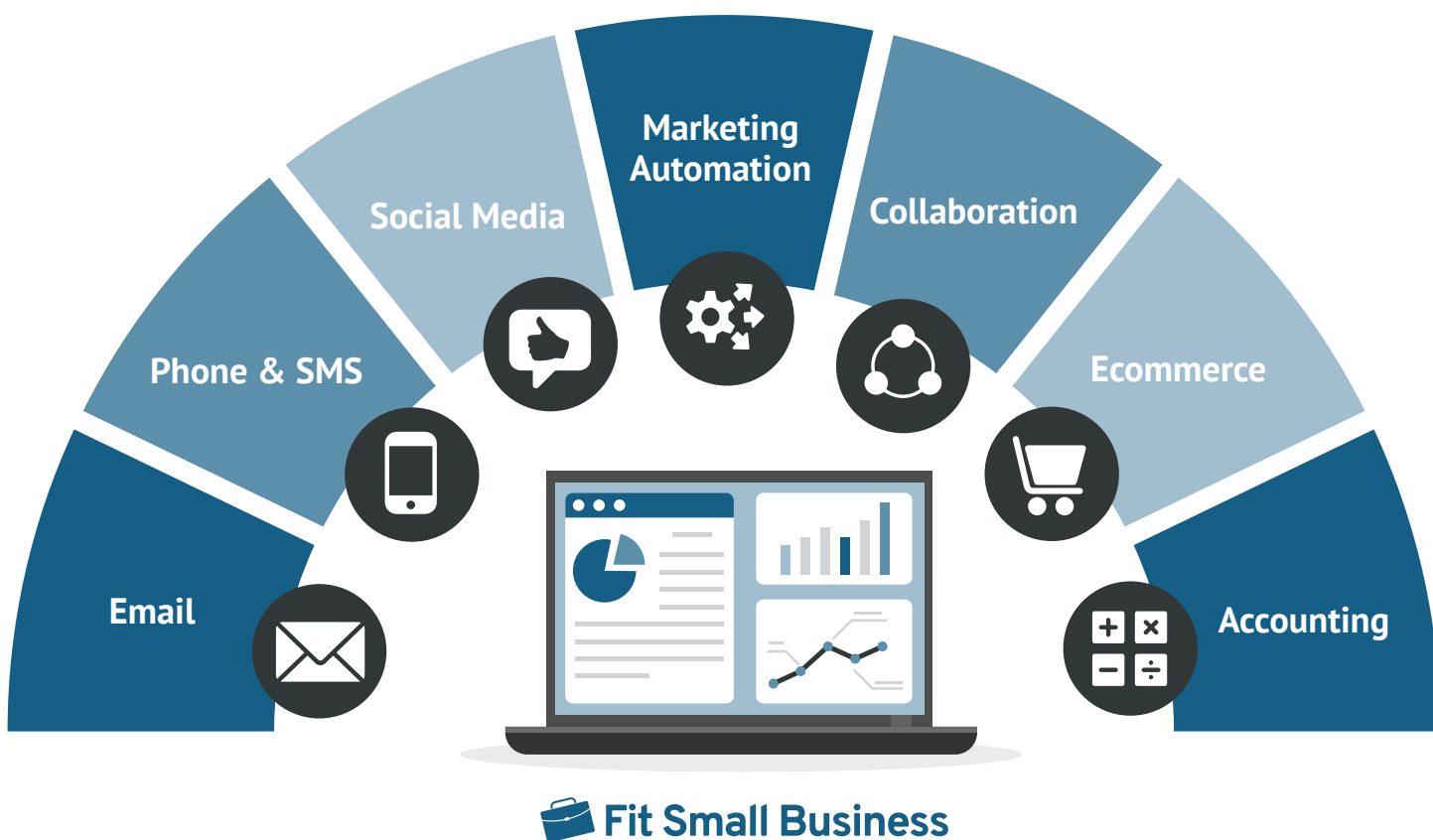
The screenshot displays a Slack interface with a sidebar on the left showing a list of channels and direct messages. The main window shows a Slack channel named #general. A message from the Zendesk app is highlighted, showing a new ticket created from a Slack message. The ticket details include the requester (Jose Consador), the subject (Loan request), and the status (New). A context menu is open over the message, showing options like 'Follow message', 'Copy link', 'Mark unread', 'Remind me about this', 'Pin to #general...', 'Delete message', 'Create a ticket Zendesk', and 'Add as internal note Zendesk'.

Popular triggers and workflows with a **Zendesk Sell and Slack** integration via Zapier

Essential CRM integrations can streamline and automate processes, save time and reduce costs, facilitate internal collaboration and data sharing, contribute to **lead generation** and nurturing efforts, and help close deals faster. Some of the useful

CRM integration examples for sales teams involve email, phone & SMS, social media, marketing automation, collaboration, Ecommerce, and accounting features.

7 KEY CRM INTEGRATIONS



CHAPTER 8

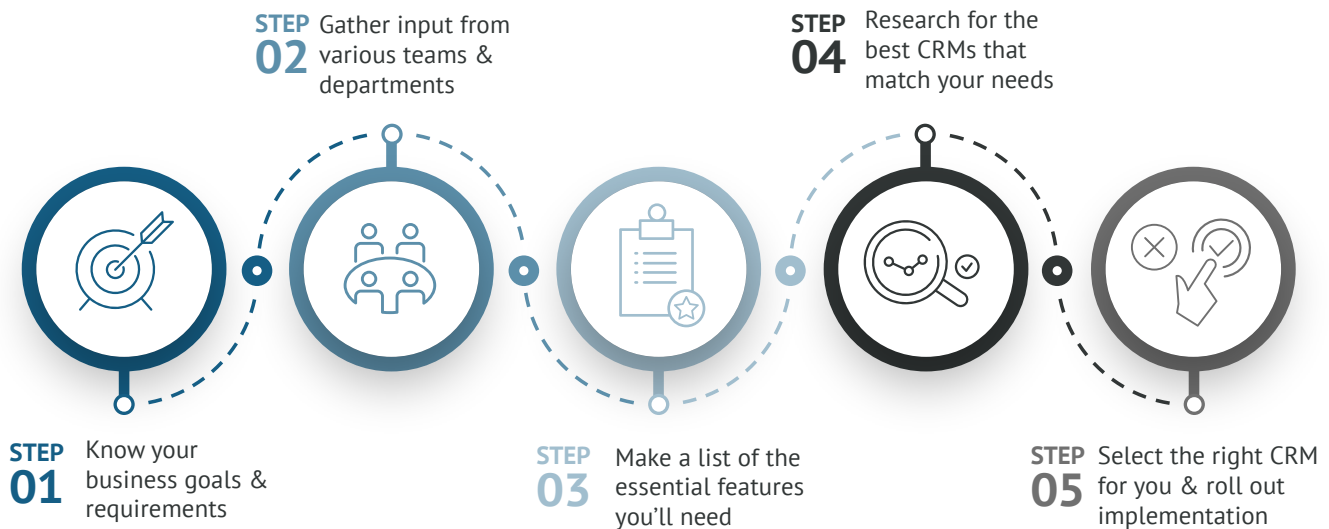
Choosing the Right CRM Software

An excellent CRM helps businesses efficiently manage customer data and streamline sales processes. **However, choosing the right provider entails a careful decision-making process to maximize time and financial investment.** Various aspects, including pricing, features, ease of use, and

your own business objectives, must be considered before committing to a particular provider.

These five essential steps will help you stay organized while choosing the most suited CRM for your business needs:

5 STEPS TO CHOOSING THE RIGHT CRM



Learn more about choosing the right CRM for your business in [our comprehensive guide.](#)

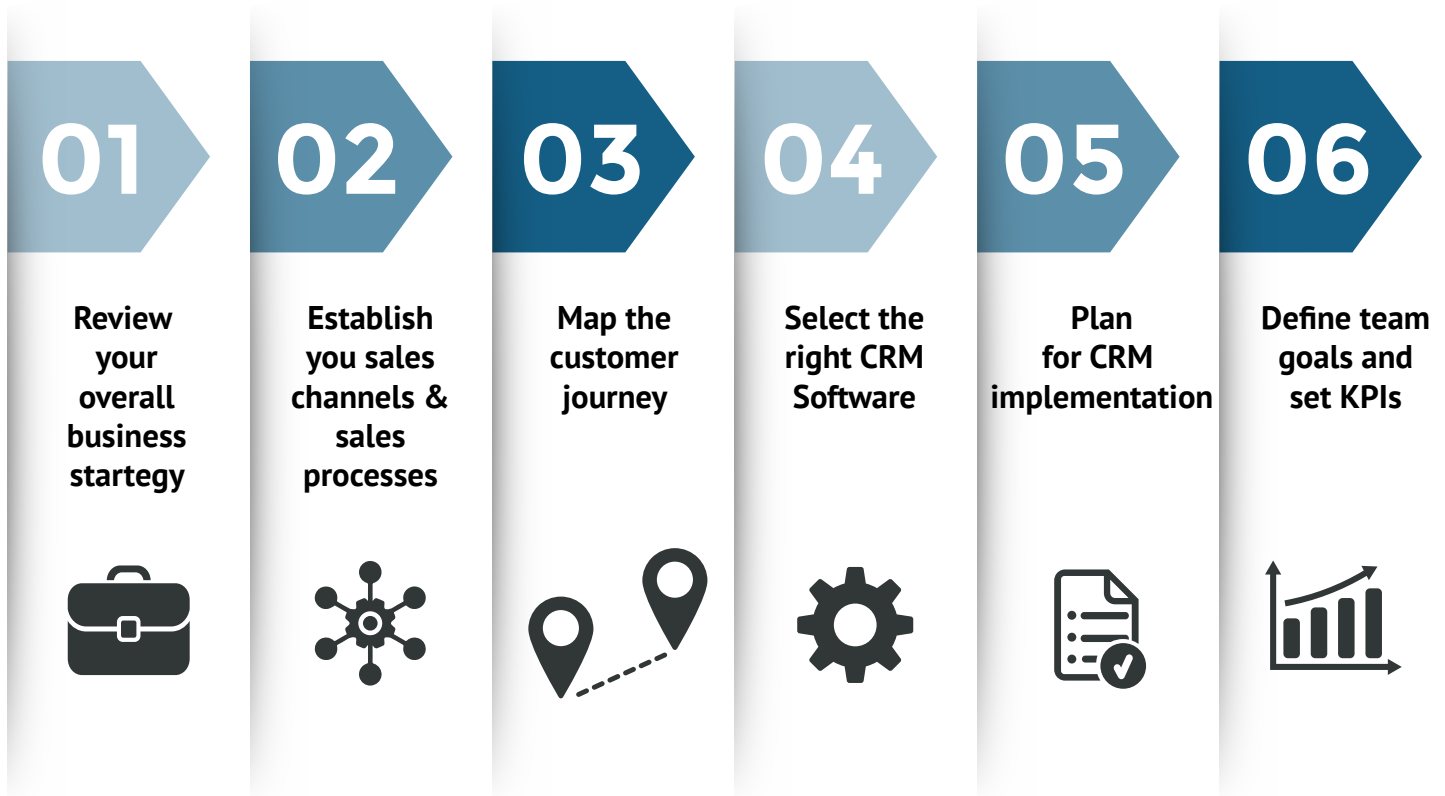
CHAPTER 9

Creating a CRM Strategy

A CRM strategy is an organization’s plan to consolidate data from sales, marketing, and customer service and then convert them into actionable information using CRM software.

Creating this plan requires reviewing your business plan and considering your customer’s journey from prospect to client, but results in a streamlined process, making it well worth the effort.

6 Steps to Create a CRM Strategy



 Fit Small Business

CHAPTER 10

Implementing CRM Software

CRM implementation is the process of setting up and deploying CRM software. While most CRM tools designed for small businesses have a plug-and-play nature, careful planning and rollout are keys to maximizing your investment. The software's

settings, integrations, and data should be set up properly, aligned with your company goals. **Learn about the eight steps in successfully implementing your chosen CRM.**

8 STEPS TO CRM IMPLEMENTATION



Fit Small Business

Learn more about how to effectively implement your CRM across your organization in [our comprehensive guide](#).

GLOSSARY

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' 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.

LEAD

A lead is 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.

Thank You!

We hope you enjoyed this guide to customer relationship management (CRM) software. Visit [our website](#) today for more small business tips and resources.

