

HOW TO SELECT

THE RIGHT CRM

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By

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Sales Redefined

HOW TO SELECT THE RIGHT CRM?



One of the most frequent questions we get asked is what CRM should we be using?





A CRM is a critical tool for all sales and marketing teams and when used right will be a real asset to your business. The great news is CRM don't need to cost the earth and there are many powerful but cost effective tools out there.

However, its's important to follow the 3 step process below to find your ideal CRM:

- 1 WHAT FUNCTIONALITY DO YOU NEED?** Identify what are your "deal breakers".
- 2 WHAT INTEGRATIONS DO YOU NEED?** What other systems do you need the CRM to connect with? Eg Xero? MYOB? Landing pages?
- 3 WHAT IS YOUR BUDGET?** Each CRM provider prices differently, some are monthly subscriptions others are 12 month lock in contracts. CRM can get expensive for large databases so be sure to get a quote based on your specific requirements.

TIPS:

- ⌚ Be realistic about what you actually need, otherwise you will pay for functionality that does not get used.
- ⌚ Most CRM have a free trial, do a free trial to try the tool first hand.
- ⌚ Be cautious of recommendations from others as they are unlikely to have the same requirements as you.
- ⌚ Ideally select a CRM which integrates to your financial systems and quoting tools to avoid duplicating effort.
- ⌚ Take into account future growth and look at pricing as you grow, will there be a big jump?

ActiveCampaign >					
ActiveCampaign.com	Hubspot.com	Zoho CRM	SalesForce.com	Insightly.com	AgileCRM.com

MARKETING TOOLS

Ability to send one-off emails	YES	YES	YES	YES	YES	YES
Broadcasting Newsletters	YES	YES	YES	YES	YES	YES
Trigger Based Emails	YES	YES	YES	YES	YES	YES
Targeted emails based on Segmentation?	YES	YES	YES	YES	YES	YES
Email Autoresponder	YES	YES	YES	YES	YES	YES
Scheduled Emails	YES	YES	YES	YES	YES	YES
Create campaigns based on segmentation?	YES	YES	YES	YES	NO	YES
Campaign based parameters based on days, hours, minutes email can be sent?	YES	YES	NO	YES	YES	YES
Mutli-user Editing? (ability to edit campaigns with your team)	YES	YES	YES	YES	YES	YES
Campaign revision history?	YES	NO	NO	NO	NO	NO
Track your campaign's social sharing?	YES	YES	YES	YES	NO	NO

PRICING

Free version	NO	YES	up to 3 users	NO	up to 2 users	NO
Free Trial	YES	YES	YES	YES	YES	NO
\$ starting price *billed monthly / user	\$15/month		\$18/month	from \$400/month	\$59/month	\$78/month/3 users
\$ starting price *billed annually / user	\$9/month	\$1200/month	\$12/month		\$49/month	NO

CONTACTS ADDED

Pricing at 5000 contacts	\$89/month	\$150/month	\$45/month	Unlimited		Included
Pricing at 10,000 contacts	\$139/month	\$337.50/month	\$70/month	Unlimited		Included

EMAILS SENT

Pricing at 10,000 sends/month	Unlimited sends	Unlimited sends	\$40/month	Unlimited sends	Unlimited sends	Included
Pricing at 50,000 sends/month	Unlimited sends	Unlimited sends	\$125/month	Unlimited sends	Unlimited sends	Included

SEGMENTATION

Ability to add website visitors as a segment	YES	YES	YES	YES	NO	YES
Segment users based on their activity	YES	YES	YES	YES		YES
Custom Tags	YES	NO	YES	YES	YES	YES
Custom Fields	YES	YES	YES	YES	YES	YES
Time zone	NO	YES	NO	YES		YES
Contact enrichment based on background data	YES	YES	YES	YES	YES	YES
A/B testing of subject lines, send times and from names	YES	YES	YES	YES	NO	YES

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WORKFLOW AND TRIGGERS						
Workflow and triggers	YES	YES	YES	YES	YES	YES
Visual Workflow builder	YES	YES	YES	YES		YES
Auto assign leads based on channels or industry? (Assign chat leads to best sales closer)	YES	YES	YES	YES	YES	YES
Lead Management	YES			YES	YES	
DELIVERABILITY						
Spam Score	YES	NO	NO	NO	NO	NO
Bounce Monitoring	YES	YES	NO	YES	NO	NO
ADDED FEATURES						
Live Chat	NO	YES	YES	YES		NO
Web Forms	YES	YES	YES	YES	YES	YES
Landing Pages	YES	YES	YES	YES		NO
Calendar	YES	YES	YES	YES	YES	YES
EMAIL EDITOR						
Email builder (HTML/CSS)	YES	YES	YES	YES	NO	YES
Simple responsive email templates(mobile friendly)?	YES	YES	YES	YES	YES	YES
Visual Builder to create email templates (responsive)	YES	YES	YES	YES	NO	YES
Ability to create dynamic content by adding on conditional formatting (custom tags, events, or custom fields)	YES	YES	YES	YES	NO	YES
Ability to save emails to email templates from campaigns/workflows?	YES	NO	YES	YES	NO	NO
Ability to send test emails?	YES	YES	YES	YES	NO	YES
Insert trackable CTA buttons without signification modification in HTML/CSS	YES	YES	YES	YES	NO	YES
LANDING PAGES & EMAIL CAPTURE						
Opt in Customization	YES	YES	YES	YES	NO	YES
Unsubscribe customization	YES	YES	NO	YES	NO	YES
Landing page builder	NO	YES	YES	YES	NO	NO
Embedded Forms	YES	YES	YES	YES	YES	YES
Pop-up Form	YES	YES	YES	NO	NO	YES
Floating Form	YES	YES	NO	NO	NO	YES

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REPORTING AND ANALYSIS

Dashbaord	YES	YES	YES	YES	YES	YES
Live Feeds	YES	YES	YES	YES	NO	YES
Contact activity feed	YES	YES	YES	YES	YES	YES
Editable contact record	YES	YES	YES	YES	YES	YES
Website activity tracking	YES	YES	YES	YES	NO	YES
Email reply tracking	YES	YES	YES	YES	NO	YES
Engagement tracking (clicks, opens, unsubs)	YES	YES	YES	YES	YES	YES
Lead Scoring	YES	YES	YES	YES	YES	YES
Site tracking	YES	YES		YES	NO	
Event tracking	YES	YES		YES	YES	

MOBILE APP

iOS	YES	YES	YES	YES	YES	NO
Android	YES	YES	YES	YES	YES	NO

SUPPORT AND GUIDE

LiveChat / Phone / screenshare support at basic account level	YES	NO	YES	NO	NO	NO
Knowledge base	YES	YES	YES	YES	YES	YES
User Support Forum	YES	YES	YES	YES	YES	YES
Product Webinar / Demos / Video Tutorials	YES	YES	YES	YES	YES	YES

ONBOARDING IMPLEMENTATION

Bulk Import	YES	YES	YES	YES	YES	YES
Migration Services	YES	YES	YES	YES	YES	YES

INTEGRATIONS

Salesforce	NO	YES	YES	YES	NO	YES
Zapier	YES	YES	YES	YES	YES	YES
Wordpress	YES	YES	YES	YES	NO	YES
Stripe	NO	YES	NO	YES	NO	YES
Shopify	YES	YES	YES	NO	NO	YES

ADMIN

Assign roles or control access to based on Roles, Profiles, and Teams?	YES	YES	YES	YES	YES	YES
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SECURITY & DATA PROTECTION

Unauthorized access warning	NO	NO	NO	NO	NO	NO
2-step verification	In beta	YES	YES	YES	NO	YES
GDPR compliance?	YES	YES	YES	YES	YES	YES
PCI compliance?	YES	?	NO			NO

FINALLY, WHAT ARE THREE OF THE BIGGEST VALUE-PROPOSITIONS THAT SEPARATES YOU FROM YOUR COMPETITORS?

1	Best auto-responder		Easy to use			Ability to integrate & customize
2	Automation		Added products			Tailor the solution based on business case requirements
3	Lead management		Competitive pricing			Workflow with parallel actions

GET IN TOUCH

We love to chat. To discuss your sales challenges and opportunities. Contact us to set up a 30 minute free consult.

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