

What to Look For in a  
Customer Relationship Management  
(CRM) Application for Small Businesses

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*insightly*

## ***You've outgrown Excel. Using your email system to track your customers has become overwhelming. What now? Here's what to look for in a CRM app that will take your business to the next level.***

Here's something that every small business leader knows: When you're launching or running an organization that has a lean but scrappy workforce, you learn to get creative. Individuals wear multiple hats, budgets are stretched further than it seemed possible, and tools serve every purpose they can—and even some they can't.

This is never truer than when it comes to tracking interactions with and information about customers. Most small businesses initially accomplish this task using email and Microsoft Excel—until they realize that the solutions they once thought were good enough have actually made employees less effective, created incomplete and scattered records, hindered sales and marketing efforts, and even compromised the customer experience. This is when organizations realize that they need a customer relationship management (CRM) system.

CRM once required a massive software investment that only the largest organizations could afford, with complex custom integrations and user interfaces that required weeks of training and dedicated in-house IT staff. But today, the CRM world is alight with affordable, user-friendly apps that were made specifically with small businesses in mind—without sacrificing any of the power that these organizations need. This boom in CRM apps is good news for small businesses, but it creates a new challenge: How do you know which app is best for your organization?

### **Four Key Considerations**

In a survey\* of more than 1,200 small-business CRM users, respondents were asked to name the most important benefits they get from their CRM system. Their answers reveal some insights into the things that are most important to small businesses and hold clues about how to evaluate CRM apps.

- 1. Improves Customer Communication**
- 2. Gives an Overall View of My Business**
- 3. Improves the Service I Give to My Customers**
- 4. Gives Insight into the Sales Pipeline**
- 5. Improves Sales**
- 6. Tracks and Manages Tasks**
- 7. Improves Internal Communication**
- 8. Improves Internal Organization**
- 9. Improves Internal and External Collaboration**
- 10. Offers Time and Efficiency Savings**

*\* Source: Insightly Customer Survey, November 2012 (1200 Respondents)*

Respondents named their top four benefits as more effective customer communication, a better view of the business, improved customer service, and clear insight into the sales pipeline. But how can you determine how well each CRM app achieves those goals? To help you evaluate your options, let's examine the top four benefits and discuss some of the features and capabilities that make them possible.

## 1 More Effective Customer Communication

What is effective customer communication? You're communicating effectively when your interactions are timely, streamlined, and tracked. Enabling more effective communications with your customers is the key capability of any CRM system, and if it doesn't do this well, it won't do anything else well. A CRM app should enable you to bring efficiency to your interactions, securely share information with everybody in the organization who needs it, and leave your customers with the impression that you're organized, attentive, and customer-focused. Look for the ability to track all communications with each customer, including full activity history, emails, tasks, notes, events, social interactions, calendar events, and any files that have been sent to the customer. If you can track and manage all this information in one place, your communications with customers will instantly improve.

## 2 A Better Overall View Of The Business

A CRM system shouldn't stop at tracking communications. Apps that have the right features can also provide an invaluable macro view of your entire business.

- **Project Management.** In many cases, if you are in a service business, closing the sale isn't the end of your work with a customer; it's just the beginning, because now you have to deliver on your commitment. If your sale includes any services that require tracking or managing, a CRM system with integrated project management makes it possible. Many CRM apps don't include project management capabilities. But the ones that do can provide a holistic view of the sales process.
- **Linking.** In many cases, you'll need to create direct relationships between different items, such as contacts, individual email messages, organizations, events, or projects. Many CRM systems offer a limited ability to associate different items. But in the real world, relationships are often complex and convoluted and sometimes defy one-to-one relationships. Look for a system that lets you create hierarchical linking relationships so you can track the full richness of all the relationships that matter to your business.
- **Dashboard.** A flexible dashboard will let you track activity by users, groups, project milestones, events, tasks, and notes. You should be able to quickly review tasks assigned to yourself and to others, and track your own commitments as well as those of your team.
- **Mobile Access.** Employees aren't always in front of their computers when they need to access or record data. Sales teams especially need the ability to access customer records when they're on the go. Ensure that your CRM system supports mobile access and lets your users access data from all major device platforms while ensuring that all access is safe, secure, and private.
- **Integration With Other Applications.** Most small businesses take advantage of free and low-fee apps made with them in mind, such as Evernote, Google Apps, Gmail, MailChimp, Zapier. Social media, too, has become a critical communication tool. So ensure that your CRM app has the ability to integrate with all of these tools and more—email, marketing automation, calendars, and sales—so you can automate the flow of information among all of your systems. If it doesn't, make sure it offers an accessible application programming interface (API) so you can build integrations to external applications. Just note, however, that most small businesses strongly prefer ready-made integrations, because custom integrations require development expertise that most small organizations don't have.
- **Customization.** To make the most of your CRM you need to customize it to your needs. Make sure your CRM allows you to create custom fields and filters so that you can easily categorize and find information.

### 3 Improved Customer Service

When you store all information about customers in one place, accessible from anywhere, anyone can locate the information they need—customer emails, specific notes, relevant files and screen shots—in moments. You should also look for the ability to “tag” specific events, notes, and emails with key terms for faster searching, or as stated above the ability to create custom fields and filters. Another critical feature is the ability to “follow” organizations or contacts and automatically receive email notifications about any high-profile customer issues that you may need to monitor more closely.

### 4 Clearer Insight Into The Sales Pipeline

Your company might already use a sales pipeline to track the sales process. But that pipeline needs to exist within your CRM system so that everyone in the organization understands what must happen next in any given account. Many CRM systems let you track pipeline steps but do a poor job of making it easy or user-friendly. So look for an app that lets you easily and quickly customize pipeline steps associated with any opportunity and automate a workflow process using multiple series of activity sets, tasks, to-do lists, and milestones. In addition, make sure that sales and pipeline reports are also accessible.

## The First Step Toward CRM Success

Insightly was designed to specifically help small businesses better understand every detail of their customers, communicate more effectively, work more collaboratively, and seamlessly integrate with many of the tools that small businesses already use. It features a clean, intuitive user interface that gets people up and running quickly. Insightly includes all of the top features that small businesses need to be more effective, and many more: contact and task management, built-in file sharing, simple permissions for configurable access, social integration, and custom fields and filters. Plus, it offers free basic accounts and premium plans as low as \$84/user/year (\$7/user/month). That’s why more than 500,000 users in small businesses trust Insightly to give them all of the power of the most robust CRM systems out there—and with the elegance, flexibility, and affordability that small businesses need.

In March 2013, Insightly contracted with TechValidate, an independent 3rd party analyst firm. TechValidate surveyed Insightly customers and found the following results:

**Return on Investment** **67%** of Surveyed customers paid back their investment in insightly in 1-3 months or less.  
*Source: Survey of 353 users of Insightly*

**Insightly Improves Productivity** **41%** of surveyed customers improved productivity or organization with Insightly.  
*Source: Survey of 1323 users of Insightly*

**Run Your Business More Effeciently** **45%** of surveyed customers run their business more effeciently with insightly.  
*Source: Survey of 1323 users of Insightly*

## Insightly Helps Small Business Grow

Source: Survey of 1328 users of Insightly

Why did you choose Insightly?



Research by:  TechValidate

For more results please visit TechValidate [www.techvalidate.com/product-research/Insightly](http://www.techvalidate.com/product-research/Insightly).

The right CRM system can change your life, leaving you to wonder how your organization ever got along without it. It can open up new doors by freeing people from the tediousness of searching for disparate data, and it can uncover sales opportunities that were hidden by the old way of doing things. Most of all, it can help you take your small business to the next level—one step closer to the vision you work toward every day.

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*Small businesses all over the world trust Insightly to give them all of the power of the most robust CRM systems out there— and with the elegance, flexibility, and affordability that small businesses need.*

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