

CRM: How do you choose the Right System for You?

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1. Introduction

Journey4, like many companies before us, have recently decided to invest in a CRM system to help us manage our contacts and move away from clunky spreadsheets and duplicated data across the business.

When you start the research, you soon find that you are faced with a plethora of choices, all claiming to be the best system in the world and confusing you with technical language that is hard to decipher unless you are an expert in the field. . So how do you choose which system is best for your business and avoid making a large investment in time (and money) i that does not meet your requirements.

This detailed review is based on our recent experience and aims to give you a little help in navigating the world of CRM and in selecting the right CRM for you.

2. What is CRM?

'CRM', as I am sure you know, is an acronym for 'Customer Relationship Management'. There are many systems available in the market ranging from the simple to the complex but they all have one thing in common they are customer driven. At the heart of the system is your customer data, all in one place and available to the whole of the organisation.

This ensures that there is one version of the truth, with the customer order and contact history available for everyone to see and to update, ensuring a seamless experience for the customer. It means you can move away from spreadsheets which are very limited in their capability for managing complex customer information.

Any basic CRM system should have be the ability to store, update and share customer information.. You should be able add contact details, order history and attach relevant documents. It should be 'owned' by your marketing department, who are the custodians of customer information, but available to all functions of the business such as customer service, operations, logistics, finance and anyone who is in contact with customers.

Some of the core features of the CRM include tools to allow organisations to integrate and optimize sales, marketing and customer service. Other CRM systems will go further and provide enterprise workflow and operational systems. The level of sophistication and optimisation is up to you and dependent on the nature of your business and its priorities. To get started and for most SME's, an entry level CRM system will deliver all the core features you will need and the additional level of sophistication can be accessed via licence upgrades.

3. Requirements

When choosing a CRM system, you need to understand what your key requirements are. We made a list of the following 10 essential requirements.

- Ease of use
- Cloud hosted
- Mobile app
- Integrates with Microsoft Outlook
- Bulk email marketing
- Sales pipeline management

- Contact management
- Marketing tools
- Reporting dashboard
- 24/7 customer support

This list could be endless and you will have your own priorities when choosing a CRM system, but it is worth while limiting yourself to no more than 10 requirements as this will help you prioritise and simplify the comparison when reviewing different systems.

Another word of warning is that the world of 'CRM' is very technical, and the language can be impenetrable at times. I wish software companies would learn to use plain English, and to be fair some have made big improvements in recent years.

Unfortunately, some still think it is all about them and the technology rather than about the customer. It will come as no surprise that the systems that we ranked highly were those where the product information was well presented and their web sites customer friendly. Despite this, there is no universal language for CRM and so different providers have different descriptions and names for the same feature, so read the details carefully.

4. Best systems for SME's

We began our search by researching the internet, using 'Google' to find the best selling CRM solutions for SME's and reading as many reviews as we could. We looked across a range of different media and sectors for reviews to get a balanced view and through this process identified the following short list. We apologise if we have left your favourite CRM system of this short list, and there are some excellent systems not included here, but these were the systems that most closely matched our requirements:

- Salesforce
- ZOHO
- Bigin (by ZOHO)
- HubSpot
- Pipedrive
- Monday.com
- Freshsales

SalesForce

No review of CRM systems, large or small, would be complete without mention of Salesforce.com. Salesforce were the pioneers of cloud-based CRM systems around the turn of the century. They changed the way we thought about CRM and opened up a whole new generation of exciting products.

It is the world's No.1 CRM solution and continues to set the bar. Its entry level 'Essentials' licence allows SME's access to the product at affordable pricing. If you are looking for a brand to hang your hat on, then look no further.

There is no denying that it is stacked with features and it is scalable for any sized business and I doubt you would be disappointed if you joined the many thousands of customers who hold a licence. However, despite ease of use being quoted as a company ethos, we believe that smaller, more agile software companies have overtaken Salesforce in this area especially for SME's.

SalesForce has a 4-tier pricing structure starting with 'Essentials' for small businesses, rising to an unlimited licence designed for Enterprise solutions for global companies. It is a comprehensive product and includes a wealth of other modules such as workflow tools and scheduling for operations.

ZOHO (including Bigin)

Established in 2005 with more than 150,000 customers worldwide, ZOHO is one of the world's leading CRM systems. It offers a free licence for up to 3 users and a free 15-day trial. It has a 5-tier pricing package starting with the free licence up to an 'Ultimate' licence to compete with SalesForce for enterprise wide solutions.

Integration with Microsoft Office and LinkedIn are included with paid-for licences, but it offers more built-in sales optimisation and marketing features in its standard and professional licences than some of its competitors.

Bigin has also been developed by ZOHO as an entry-level CRM system designed specifically for small businesses. It is easy to use, scalable and offers impressive integration with Outlook. It also allows mass email marketing. Bigin does not offer a free licence but includes a free 15-day trial and the licence fee is a reasonable £5 per user per month thereafter, so will not break the bank for a small company.

HubSpot CRM

HubSpot is a free CRM system, with unlimited users and can hold up to 1m database contacts. The company was established in 2004 and has 79,000 customers worldwide and employees more than 3,500 people.

The company ethos is built on being customer focussed. It is based on the principle of 'inbound' marketing where customers don't want to be harassed but instead want to be helped. The system allows you to stop interrupting them and return the focus on the customer. The core CRM is rich in features and is free for everyone.

It has bolt-on modules for those looking for greater integration and optimisation for sales, marketing, customer service and more recently they have added a content management system (CMS) module. These additional modules are licensed for a fee and provides scalability for the largest business, enterprise wide. HubSpot CRM contains some free versions of tools available in the paid for Sales and Marketing hubs.

PipeDrive

Established in 2010 in the USA and now have more than 90,000 customers worldwide and 600 employees. It is a sales-focused and activity-based CRM system, advertised as a CRM made for salespeople, by salespeople. It is activity or task based and has a highly visual sales pipeline feature and visual history of sales calls, emails and activity. This is all very good for small businesses looking to grow.

It is available on a 14-day free trial and has 4 paid-for licence options, although there is no free licence available. Prices are comparable with SalesForce, Monday.com and Freshsales. Mass email and other marketing tools are available on its 'Professional' licence and above.

Monday.com

Another USA-based product with more than 100,000 customers worldwide, it comes with a free 14-day trial but no free licence options. It is a comprehensive system, akin to Salesforce in terms of its applications but has its roots in workflow process management. Its strength is an ability to operate as a common workplace environment across an enterprise, providing a platform for all aspects of the business.

The services suite is aimed at businesses whose ethos is to promote transparency and encourage collaboration. In this way, the tools can be used to deliver a stronger ownership culture with employees, so they feel more empowered and, by definition, more productive.

It has a 4-tier pricing package from basic entry level to an enterprise wide licence. It is a very good system but set up for larger businesses, which is where I think its strengths lie. It is also a little complex for an SME to handle, especially if it is your first CRM system.

Freshsales

This product was developed in India in 2010 and now has more than 150,000 customers worldwide. It has the benefit of being a dedicated CRM system, designed to overcome some of the complexities of its competitors. The designers wanted to develop something very simple to use and easy to maintain, without the need for an expensive IT department.

There is a suite of sales, marketing and customer service tools, built around the core CRM system and comes with a free 21-day trial. It does offer a free licence option but unlike HubSpot and ZOHO, the features on the free licence are more limited and you really need to select a paid for licence to enjoy a similar level of capability. It has a rather complicated 5-tier pricing package and the licence costs are higher than ZOHO and more comparable to PipeDrive and Monday.com

A summary of the pricing for each of the systems is given in the table below. Prices are based on published information from company web sites in June 2020.

	Free Trial	Free Licence	Paid Licence	Additional Licences
Salesforce	Yes – 30 day	No	£20 up to 10 users	Professional £60 unlimited
ZOHO	Yes – 15 day	Up to 3 users	Standard £10.00 per user	Professional £16.00 per user (Outlook integration)
Bigin (by Zoho)	Yes – 15 day	Single user	£5 per user	n/a
HubSpot	No	Unlimited	HubSpot CRM free for all users	Sales Hub - from £33.60 (2 users) Marketing Hub - from £33.60 Service Hub - from £33.60 (2 users) CMS Hub - from £196
Pipedrive	Yes – 14 day	No	Essential £12.50	Advanced £24.90 Professional £49.90 Enterprise £99.00
Monday.com	Yes	No	Basic £35 for 5 users	Standard £43 for 5 users Pro £69 for 5 users
Freshsales	Yes – 21 day	Unlimited	Blossom £19	Garden £20 Estate £40

5. Ranking

We have scored each of our requirements out of 10 for each system, giving a maximum score of 100, which we have then divided by 10 to give a ranking out of 10.

Product	Score (out of 10)
HubSpot CRM	9.8
Bigin (by ZOHO)	9.5
ZOHO	9.0
Pipedrive (Essential)	8.8
SalesForce (Essential)	8.7
Freshsales	7.9
Monday.com	7.3

On the basis of our scoring **HubSpot CRM was the highest ranked system for SME's**. It is packed with features, meeting all of our essential requirements and is free to use. It is easy to use and set up and delivers all the requirements around mobility, being both cloud based and with an impressive mobile app.

It does everything you want for a CRM system and you don't need an IT department to get it up and running. Furthermore, it is scalable for your business, allowing you to add further models – sales, marketing, customer service – depending on your requirements ensuring you do not need to invest in a new CRM system.

We would also highly recommend ZOHO for small enterprises, particularly its 'Bigin' product which is specifically designed for SME's but retains the richness of ZOHO and is scalable. Both Bigin and ZOHO's full CM system are easy to use, excellent product features and fully mobile. The licensing options are attractive with low cost licences for 'Bigin' and free licences for up to 3 users for the full ZOHO CRM. ZOHO's biggest drawback is around the marketing tools, for which are available but only if you upgrade to Professional licences.

Looking at the rest, **Pipedrive is worthy of mention** as it is excellent if you prefer a highly sales-driven CRM system. It has a particularly good sales pipeline tool allowing you to easily visualise your sales pipeline, which is ideal for small businesses. However, its pricing is not as attractive, and its marketing functionality is not as good as HubSpot or ZOHO until you pay for some expensive licence upgrades.

6. Conclusion

Don't let the complexity of selecting a 'CRM' system put you off as the benefits you derive from them are worth the effort in time and money. If you are clear at the outset what your key requirements are then this will help you select the right system for you.

In today's society, mobility and accessibility are the key so ensuring your system is cloud-based and accessible via your mobile phone as well as your laptop is essential. Ease of use is also fundamental to the success of your CRM, not only in setting it up but also in ensuring your teams can adopt it easily and can quickly see the benefits so that it changes the way you operate.

SME's don't have dedicated IT departments so you must select a system that is easy to setup and use and has excellent support behind it. You also want a system that is going to scale with your company, so you don't have to switch systems later on in your development.

We have been pleased with our selection and HubSpot is delivering against all of our essential requirements, with a lot of pleasant surprises along the way too, as we get to know to product better and explore some of its many features that are available with the free licence.

We hope that this blog helps you find the right system for you too.