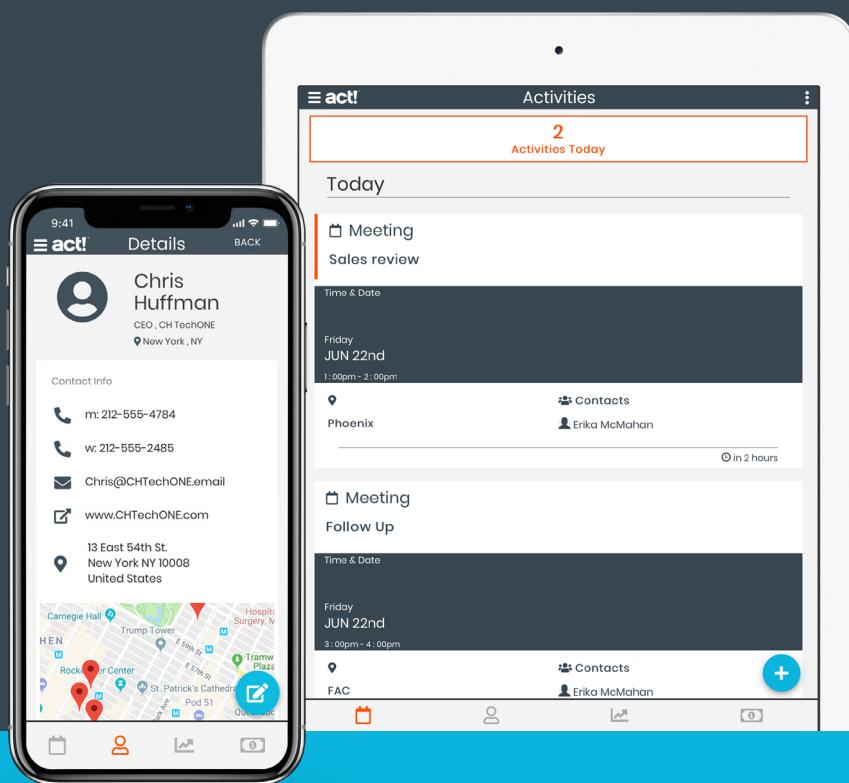


# How to choose the best CRM solution for your business

Learn how to select the right solution that will help you **punch above your weight** when it comes to finding new leads, following up on prospects and providing a better service.

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# Introduction



So how do you choose a CRM system that's **right for you?**

While CRM solutions come in many shapes and sizes, they all have essentially the same aim – to help you collect, organise and understand key information about existing and would-be customers so you can do more and better business with them.

Much more than just a means of storing contact details, a **Customer Relationship Management system is a powerful tool that enables even the smallest business to ‘punch above its weight’** when it comes to finding new leads, following up prospects and providing a better service.

However, these significant commercial benefits are lost if you fail to select the most appropriate CRM software for your business in the first place.

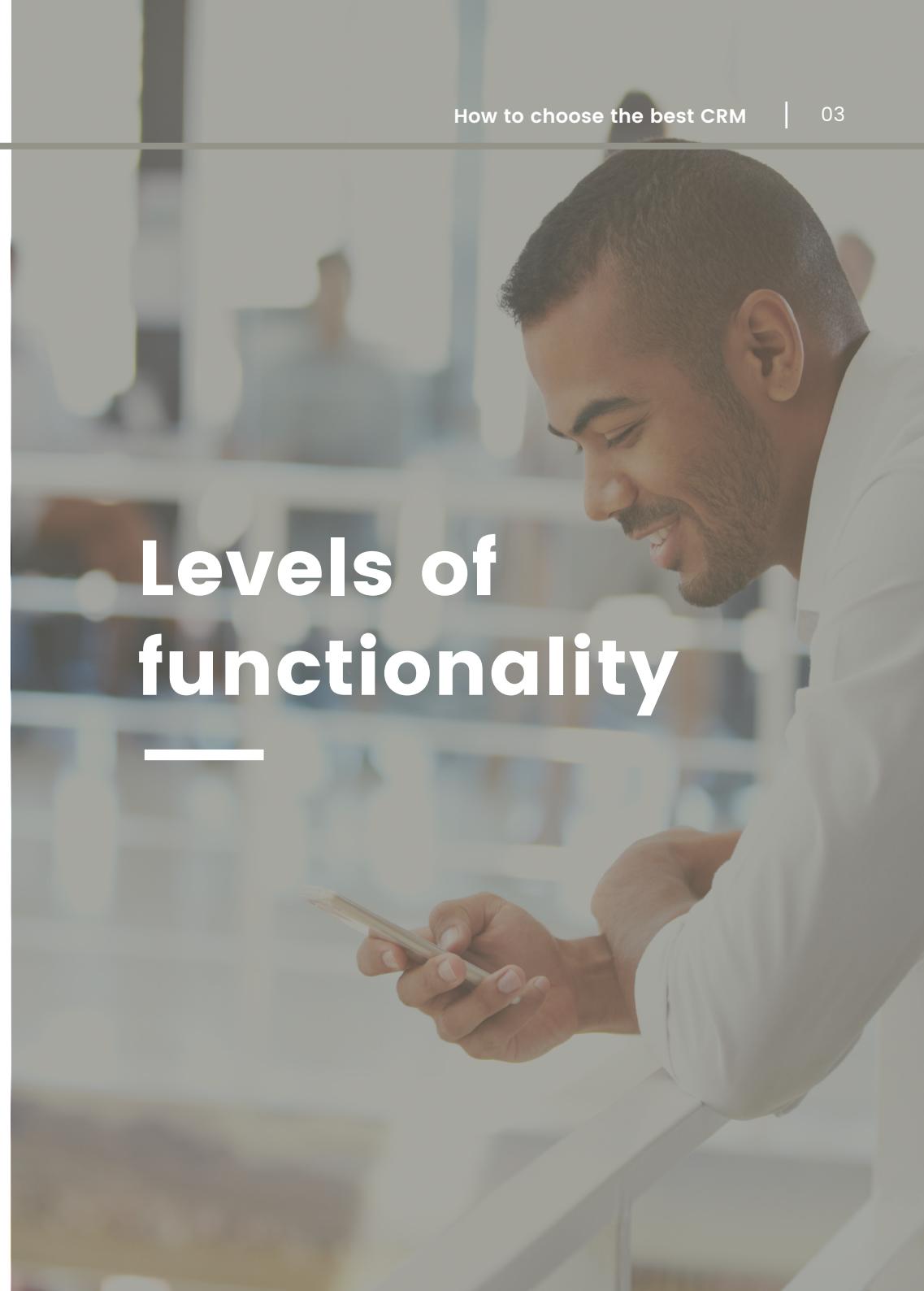
It's important to prioritise your requirements right at the start, to help you decide if the CRM software offered actually has the functionality you are looking for, now and into the future.

Failure to set out your needs and priorities can mean you end up with an under-performing system, bloated with unnecessary features which, rather than helping you, actually have a negative effect on day-to-day usability.

So, for example, if a particular CRM tool doesn't allow you to 'slice and dice' your database by demographics, interests, personal preferences or other relevant criteria, you won't be able to segment customers for marketing purposes or get the detailed insight you need to target them effectively.

## Levels of functionality

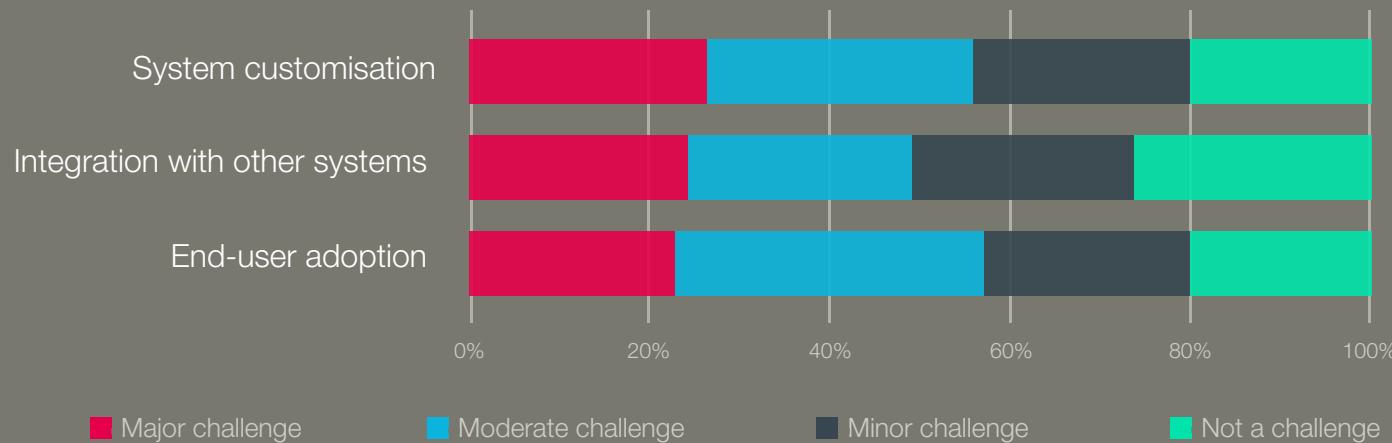
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Because it can be difficult to figure out exactly which CRM solution your business actually needs, we go out of our way to work with our customers to define their requirements, so we can help select the best Act! product for them.

## Challenges with current CRM systems

Software Advice<sup>1</sup>

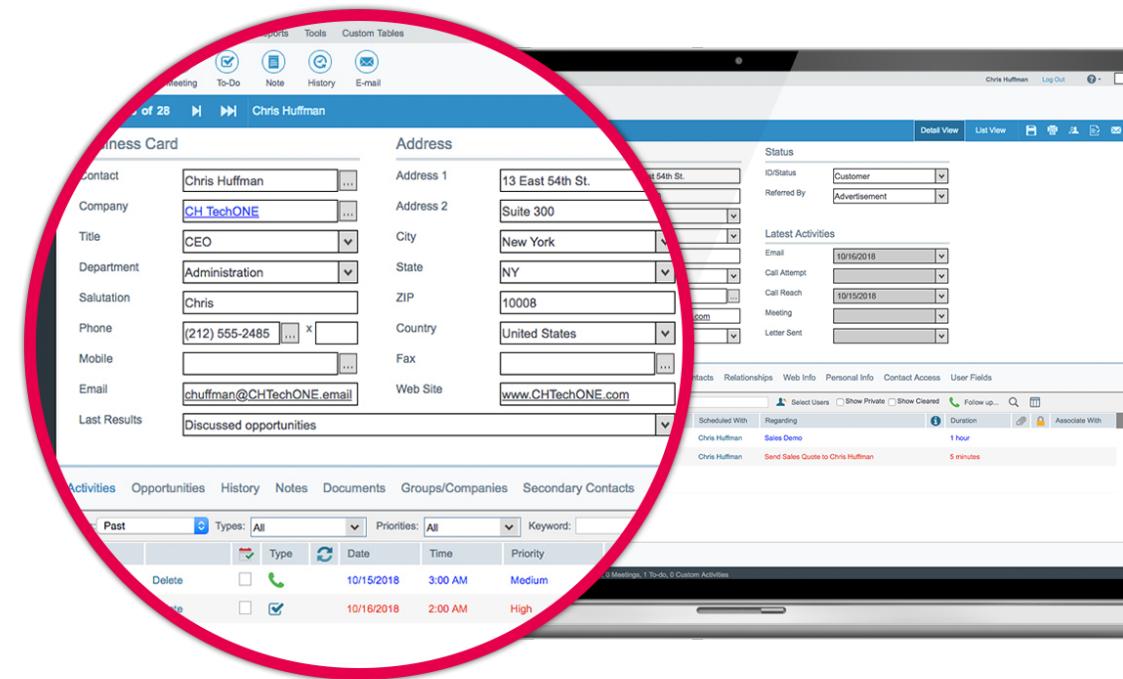


# Expandability creates flexibility

While it's important to have a CRM tool that works for you right now, you also need one that has the ability to grow with you, or every few years you will have to go through the whole selection process again.

That makes third-party integration another key element of any CRM software, as ready availability of add-ons, extensions, plugins, themes and templates can increase functionality and capacity. Without that third-party integration you won't be able to connect with other applications, which means you won't be able to streamline workflows, for instance, by removing repetitive tasks.

However, if you can link your CRM system with other apps, you won't have to manually export or import data to and from your accounting package, for example.



That's why we developed [Act! Connect](#) — an API that makes it easier to integrate Act! with hundreds of popular business tools, so you can work smarter and faster.

## Act! Connect

Act! Connect puts integration with hundreds of popular business apps at your fingertips! Quickly and easily set up connections between Act! and Outlook®, Slack, PayPal®, Wufoo™, QuickBooks Online, and more! Enrich your Act! data and trigger actions that save time and accelerate your sales and marketing efforts.



The screenshot shows the Act! Connect interface. At the top, there's a navigation bar with links for 'Write', 'Reports', 'Tools', 'Custom Tables', and user information ('Chris Huffman' and 'Log Out'). Below the navigation is a search bar. The main area is titled 'Act! Connect' and features a 'What is Act! Connect? See it in action!' section with a video thumbnail. To the right is a 'Need help?' section with three steps: 1. Confirm you're on the latest version of Act Premium. Need to upgrade? Download here. 2. Install and set up the Act! Web API via an Act! Premium for Web server. Review documentation for additional help. 3. You're ready to create your first Connection! Choose a Connection and have your database URL, database name, user ID and password handy. Need help finding them? Below these are links for 'More resources', 'View more Connections', and 'View Act!-specific add-ons'. On the left, there are sections for 'Featured Connections' (Shopify, Act! Companion, Act! Premium Contact Link (Outlook), Ask Act! with Amazon Alexa, Eventbrite) and 'eCommerce Connections' (BigCommerce, Ecwid, Etsy, Shopify). A 'Get started' button is visible at the bottom left.



Whether it's bespoke or off-the-shelf, you need a CRM system that's easy for your staff to use. By their very nature, overly complex systems take longer to learn and are harder to work with, so any CRM solution you choose must have a clean and simple interface that's intuitive to use. That's why Act! is specifically designed to allow new users to get up to speed in just a few hours.

Because it is so easy to learn and use, [Act!](#) has become the first choice Customer Relationship Management tool for smaller businesses that don't have the time or resources to spend on long-winded software training. That greater usability also means that more people can learn how to use the system, creating a more responsive workforce who can answer and respond to customer requests, even when an account manager or salesperson isn't around.

## Usability is key

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80% of businesses using a CRM system find that end-user adoption is a challenge.

Software Advice<sup>1</sup>

The screenshot shows the Act! CRM software interface. At the top, there's a blue header bar with the 'act!' logo on the left and navigation links on the right. Below this is a white header bar with the title 'Details' in the center and a 'BACK' button on the right. The main content area displays a contact card for 'Chris Huffman' (CEO of CH TechONE) located in New York, NY. The card includes sections for 'Contact Info' (with icons for mobile phone, work phone, email, and website), 'Address' (13 East 54th St., New York NY 10008, United States), and a 'Map' section showing the location in Midtown Manhattan. At the bottom of the card, there's a red button labeled 'Navigate in Maps App'. Below the card, there are sections for 'Opportunities' and 'FP Building Supplies-Portable Construction Offices'. At the very bottom, there are four small icons: a calendar, a person, a chart, and a document.

## Usability is key

(continued)

Plus, Act! enables managers to make faster data-informed decisions. In Act!, actionable business insights are just a few clicks away: See dynamic, visual snapshots of real-time metrics covering sales productivity and performance, sales pipeline health, top performing products, win/loss analysis, and more with interactive, graphical dashboards.

You can read how one mortgage broker, who's a sole trader, chose Act! to manage and grow his business.

[Click here to read the case study.](#)

Steep, long learning curves are something to watch out for, particularly with bespoke systems, which generally tend to be more complex. So, if you do go down this route, ensure that the vendor is strong both on the initial training they offer and their follow-up support.

Of course, no matter how good the system is, a little help will always be needed at some point, which is why you should think of the CRM product and its supplier as a package.

That's the reason we provide a range of support options. For example, with [our digital self-help service](#), you can watch a range of training videos, take Act! feature tours and tap into our online [Knowledgebase](#). Or, if you need more specific help, you can call or live chat with our Technical Advisors as part of your Act! subscription. And if you need more hands-on advice, there are [Act! Certified Consultants](#) who can take you through everything from initial set-up, customisation and integration of your system to ongoing training.

## Support when you need it

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# Do you really need a customised solution?

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If you have a unique business model, then a more costly purpose-built solution, shaped to your business, may be the way to go.

With a customised solution, its vendors should be willing to work with you to analyse and assess what specific functions you need and build them into your system.

However, don't forget that off-the-peg software, which you can tailor to your needs to some extent, could provide pretty much all the functionality you need more cost-effectively than a custom-built CRM system.

So, while a bespoke CRM system can be shaped most closely to your business needs, if a generic product has lots of customisable fields, it's possible to create your own highly-tailored solution that gives you the information you need, when you want it.

## Do you really need a customised solution?

(continued)

Act!, for example, has over 60 fields that can be shaped to your specification. From emails, addresses, phone numbers and social media accounts, through to relevant documents, purchase history, preferences, and the latest interactions, you have total control of the system, which enables you to zero in on relevant data.

And if you want to unlock the full potential of your data why not use Custom Tables. [Custom Tables Manager](#) enables you to bring complex data sets, unique business processes, and specialised industry practices together in Act! to manage your business.

CRM customisation is a major or moderate challenge for 56% of businesses.

Software Advice<sup>1</sup>



# How important is accessibility

If you need remote workers to have access to your Customer Relationship Management data, you need a cloud-based solution that enables them to connect from wherever they are, which they won't be able to do with on-premise solutions.

Act! CRM's Cloud solutions use secure cloud hosting, which means there's no software to install and you don't need to worry about managing any IT, as all technical elements and updates are dealt with by us.

For many smaller businesses, a cloud-based CRM solution will be the first choice, given the minimal capital outlay and upfront costs, as well as the greater flexibility to expand going forward.

Similarly, if you want access via your smartphone or tablet, you need a solution that has its own mobile app, or which can easily be viewed using your mobile web browser.

## Do you really need a customised solution?

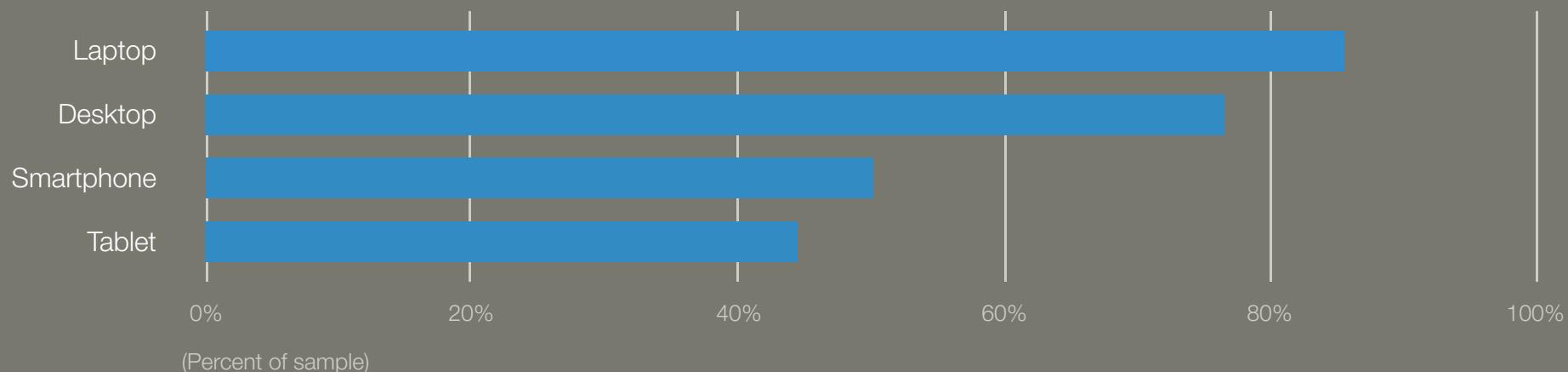
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[Act! Companion](#), for example, is a CRM app designed for iPhone®, iPad®, and Android™ which is included in your Act! subscription at no extra charge. The app enables you to stay connected to key contact and customer details from wherever you are.

It should go without saying that since your CRM software is at the very heart of your business, whether you are using a cloud or on-premise solution, it should possess robust security, so you can be confident your data is protected from loss or attack.

## Devices used to access CRM systems

Software Advice<sup>1</sup>



Typically, vendors of CRM products work to subscription-based pricing, though some may charge a flat monthly fee for a set number of users, then require you to pay extra for additional services and users, which can come as a surprise. There may also be other hidden or set-up costs to look out for. So, before committing, do a reality check on both upfront and on-going costs, as well as potential contract lock-ins that could see you having to stick with a product for longer than is ideal.

To make sure we meet the needs of smaller businesses, we have created [a range of Act! products](#) to suit every size of business budget, each with transparent pricing so that you know exactly what you are getting and how much it will cost.

## How much does a CRM solution cost?

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- ✓ Ease of use for staff members
- ✓ Training and ongoing support
- ✓ Third party integration
- ✓ Customisable fields that can suit your business
- ✓ Cloud based solution accessible from anywhere, on any device
- ✓ Robust security and data protection for peace of mind
- ✓ Transparent pricing, terms and conditions
- ✓ Sign up for free trials and free cut down version of vendors product

## **8 key things to watch out for when choosing a CRM solution**

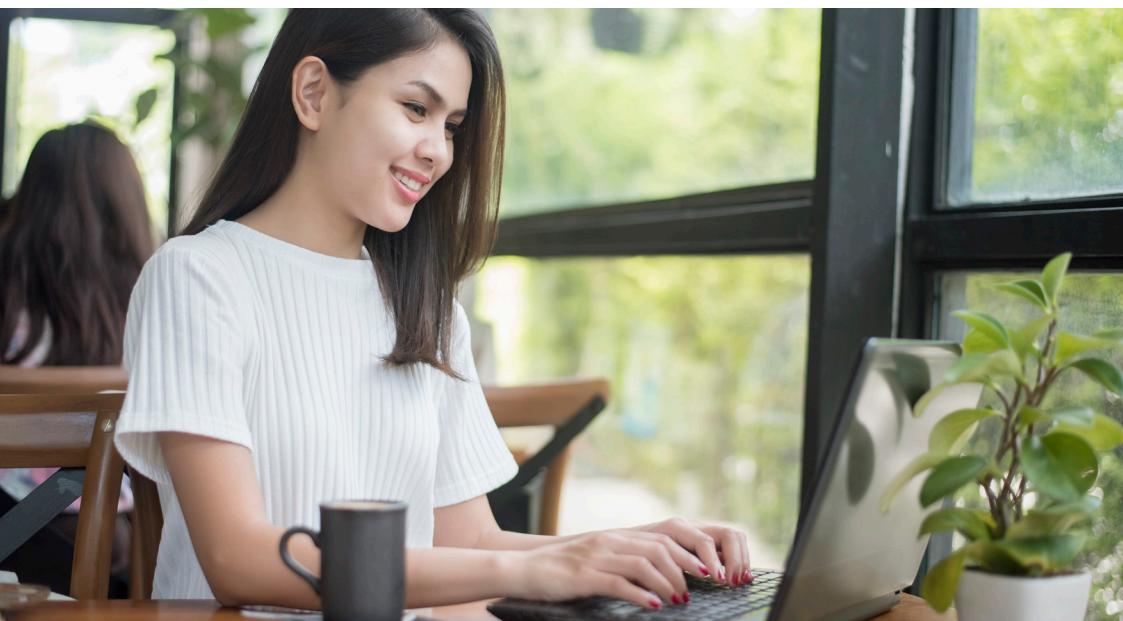
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## Take Act! for a spin

Of course, if you're not sure whether a particular CRM is right for you, many vendors offer trials or even free, cut-down versions of their product, which will give you a sense of what might suit. So if you haven't done so already, it's easy for instance to [try Act! at no cost](#).

Put all of this together and you should be able to find the perfect CRM solution - as one of our customers puts it, “Act! is simple and makes life much easier!”.

Act! offers a total service package that has helped us grow, so I can wholeheartedly recommend it to others.



**Micha Martin Lauterjung**  
CEO of Münchner  
Versorgungsmanagement AG



## What is Act!?

Purpose-built for small and midsized businesses, Act! combines proven CRM with powerful Marketing Automation, providing you with the ultimate toolset to drive business growth.

**Growth made easy.**

CRM & Marketing Automation built for small & midsized business success.

To learn more about Act! visit

[www.act.com](http://www.act.com)

Or call us at

AU 1300 362 046 | NZ 0800 443 163

Connect with Act!



<sup>1</sup> CRM Software UserView 2014

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