



Your Small Business Resource

# A BEGINNER'S GUIDE TO CRM APPS

# Authors



**Muthu Ramalingam**

CEO

HelloLeads CRM

Muthu has over 25+ years of experience in business and technology consulting. Muthu's experience includes stints at PwC, IBM and Infosys in implementing ERP/ SAP for improving operations. At HelloLeads.io, he helps small businesses to adopt technology in creative ways to accelerate their sales and growth.



**Preethiya**

Small Business Expert

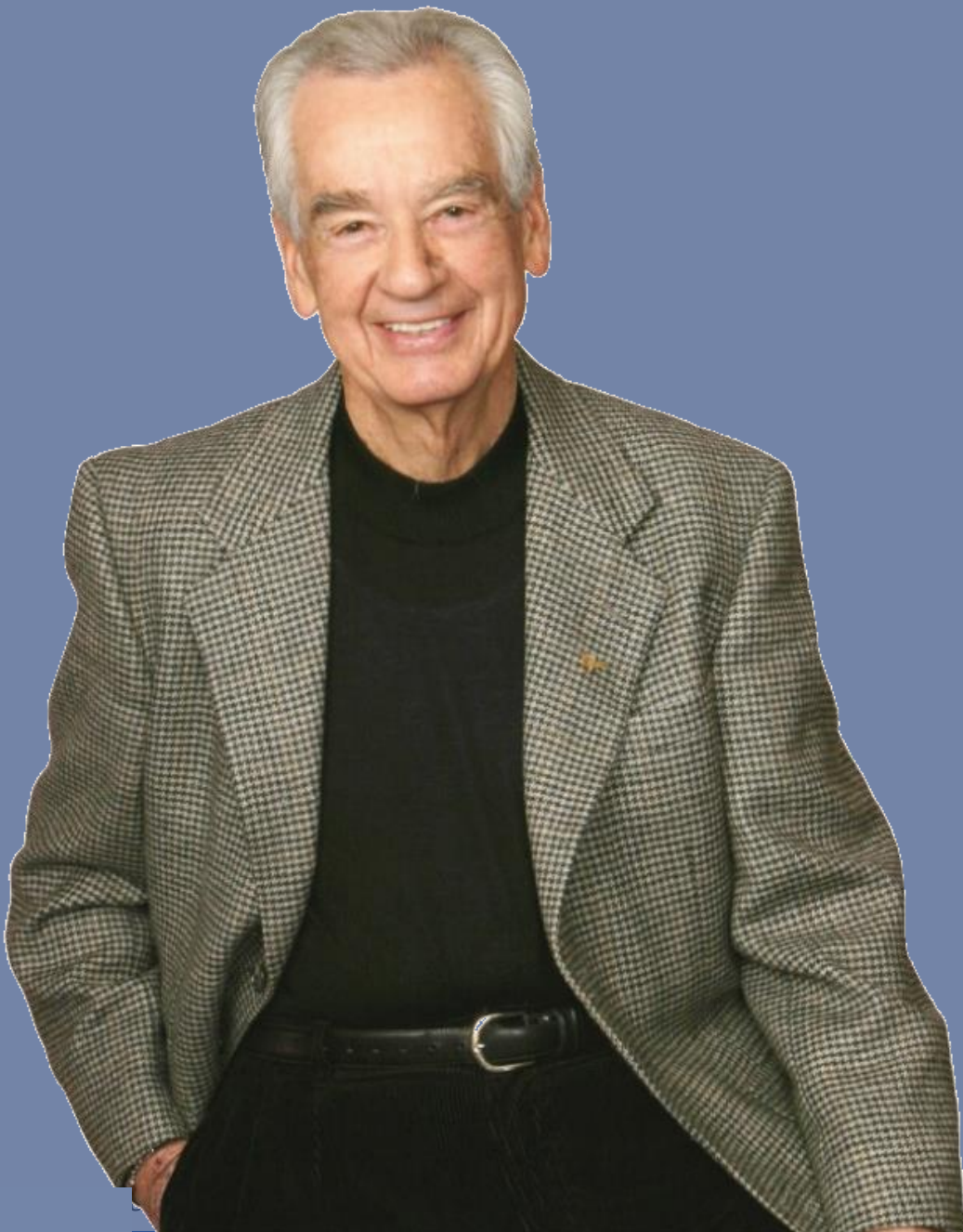
HelloLeads CRM

Preethiya has over 10+ years of experience of helping small businesses succeed. She researches tools and technologies and brings insights that helps small businesses to grow in the digital age. Many small businesses have benefited from her research, insights and experience.

*This guide is from HelloLeads CRM. The objective of this guide is to assist small businesses understand CRM apps and help in their CRM journey to grow their business.*

***“For every sale you miss  
because you’re too  
enthusiastic, you will miss a  
hundred because you’re not  
enthusiastic enough”***

—— Zig Ziglar ——



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# 1

## What is CRM?



*CRM cultivates strong bonds with prospective customers by way of faster and better responses and hence helps in improved sales conversion rates.*

“Excel files in your desktops, contacts in the phones of sales team members, and fragmented WhatsApp messages with everyone, all hinder sales conversions and growth.

CRM, on the other hand, serves as a central repository of all leads and customer data that are sharable, up-to-date, and brings efficiency”

Creating a successful small business isn't easy. It takes a considerable amount of time, energy, and resources to build one and maintain it. For small businesses, such as the one you are managing today, you and your team should be busy with only two things: (1) finding new customers and (2) retaining the existing ones. Nothing else.

The growth of your business depends on how well you understand customer needs, how fast you qualify them, and how quickly you respond to leads. Given the collaborative nature of sales today, it is not prudent to keep lead data and customer data in excel sheets, phone contacts, business cards, or in any other fragmented 'not-so-easy-to-access' forms.

On the other hand, CRM is a technology-enabled process and a solution that helps you in bringing all leads to one place, managing them better, and improving your relationship with prospective customers and existing customers.

CRMs help in managing customer and lead records in one central repository, help in tracking leads, following up, managing sales, and taking care of customer support, all under one roof. Managing customer data in a central place helps team members to have instant access to data, take quick decisions, and improve sales and customer support.

For any business, staying on top of customer data is difficult with manual records, sticky notes, and n<sup>th</sup> version of our excel files. Closing business deals is even more difficult. To win a customer, a streamlined process is essential. CRM plays a vital role in improving the business process and relationship with leads and customers.

CRM brings many benefits for small and growing businesses. They include:

- All customer data in once place
- Access to customer information anytime and anywhere, on the go
- Managing your leads more efficiently
- Build strong relationships through effective customer interaction
- Streamlining your sales process
- Actionable report on sales and team performance
- More transparency of customer data
- Improved customer service

All these help in getting new customers, retaining existing ones and increasing your sales revenues.

“Great to hear this. But how does a CRM work?”



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*“CRM can propel your small business to next orbit and deploying one is not a rocket science.”*

# 2

## How does a CRM work?

*CRM adaption, eventually, results in higher customer satisfaction and an improved retention rate*



Every organization today has a huge amount of data about its leads and its customers. This data is usually fragmented, mostly static, and hence does not help in an instant connection or quick decision-making to solve the problem.

CRM software helps to solve the problem by bringing all lead data into one place, all conversations to one central location and hence enables quick interactions between sales team members and your prospects.

CRM helps in empowering sales reps in tracking every interaction with customers and provides business intelligence.

### **1. Bring all leads and customer data into one central place**

Today, leads come from multiple sources - Facebook ads, website enquires, walk-ins, or third-party portals.

Your existing leads are in spreadsheets or phone contacts.

Managing each source of lead is a herculean task and each source has its own peculiarities. A good CRM would bring all leads into one central location and bring visibility of lead data to you and your sales team.

## 2. Follow up and close more deals

It is said, “Your fortune is in follow-ups”. Any lead, to get converted into a customer, needs 7 to 9 follow-ups on an average. So, it is important that you follow up with your leads regularly without fail.

A good CRM can track when you contacted a lead last time and when you need to follow up next and who will follow up.

A small business owner cannot do everything on his own. So, he or she needs to distribute and assign leads using a good CRM to specific people in the sales team for follow-ups.

## 3. Make your sales workflow more efficient

The central part of any CRM software is workflow management.

Once you place a lead or a prospect, the CRM software will funnel it through the sales process, while associating the lead with relevant records on calls, documents, reminders, and messages.

Instant response to your leads can be automated easily using a CRM and helps in improved sales conversions.

## 4. Get alerts on essential sales tasks

Based on your tools and settings, a CRM software can remind you of sales actions that need to be done.

You can initiate phone calls or perform pre-scheduled activities like sending emails. Everything performed with the software is recorded, thus giving you enough time to make better action plans.



*The first 10 minutes is a golden window for making a contact and establishing a relationship.*

*Companies responding in the first 10 minutes have a huge advantage over others.*

## 5. Generate more opportunities

CRM can be used even after the deal is closed. Customer issues can be tracked by the software by alerting him or her with a question that suggests a need for upselling or cross-selling. In such cases, for more potential revenues, the customer can be funnelled back to the sales pipeline as a new lead or an opportunity.

## 6. Integrate with other key business systems

A CRM can work side by side with other key business systems and applications.

CRMs can also integrate with third party lead generation systems, e-commerce platforms, marketing automation systems, billing, or accounting systems.

A good CRM can help you to drive powerful results for your small business when used in the right way. It enhances sales, marketing, and customer service levels for your business.

In addition to streamlining sales operations, a CRM software can help you in building a better sales & marketing strategy and have a positive impact on the long term growth of your business.

# 8 things a CRM can do for your small business



# 3

## Small businesses do not need a CRM !

*“CRM is for large businesses. Small businesses can manage sales with manual records or spread-sheets and hence may not need a CRM “*



When we say small businesses do not need a CRM, it is also like saying small businesses do not need capital or people! Below are the top 10 reasons given by Small Business Owners to defend this myth!

1. We are a small business, after all!
2. We have a very small team of salespeople
3. We don't have a lot of customers
4. We don't like digitization
5. We have a well-established customer base, so we don't need any software
6. A cloud-based software may not be safe and it is risky
7. I like it but my team may not use it
8. It is way too expensive and not a necessity at this moment
9. We are already busy and don't want to invest time in learning new software
10. CRMs are complex and take time to deploy and use

More than 10,000+ small business owners, surveyed by us globally, have reported that they were able to manage leads and customers, very efficiently, using a CRM instead of other methods.

‘A small business may not need a CRM’ - this statement was true probably 25 years back. But times have changed and also the business ecosystem.

With everything going digital, sales processes cannot stand on an isolated island. Leads are coming from all directions and salespeople are on the move.

Also, there is an intense competition. Responding to leads faster or responding first is very important to win customers today.

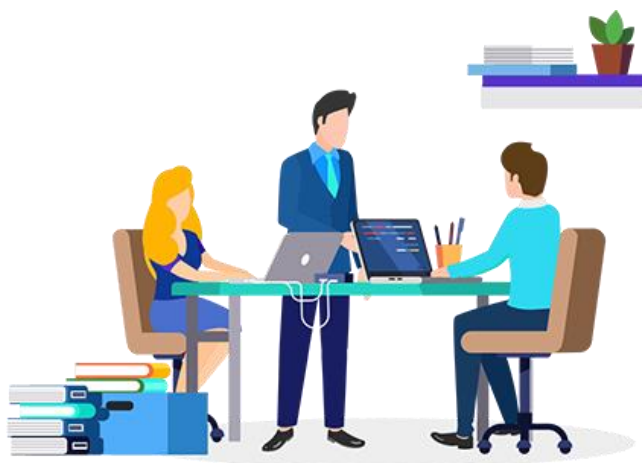
A great customer experience is no longer a competitive business advantage. It is a must.

*“CRM will help you build longer, more profitable customer relationships and accelerate sales”*



Even for a small business, the flow of leads is considerable today. Every small business is overflowing with leads from multiple sources.

Small business owners and sales teams struggle to respond to leads and nurture them. For example, if a small business exhibits in a tradeshow, it gets 50-100 leads a day, or a Facebook Ad generates 100+ leads in a few days. It will be overwhelming to handle these leads manually, tracking and communicating with them.



A spreadsheet is ok when you start a business. But as your small business grows spreadsheets are not very helpful.

You or your sales team member need to quickly locate customer data when there is a question or request. You need to look at earlier conversations to understand the context.

With a good CRM, you get a complete overview of your leads, customer profiles, and the history of your communication with them. An spreadsheet will provide all the data and it will not remind you whom to call today.



*As a small business, you need to make customers feel respected, important, and delighted.*

*Customers should become the central driving force for your small business. A CRM is a must to do this.*

At times, salespeople in a small business feel CRM is an overhead. They feel they had to enter data digitally after every interaction. But with automations that are available in CRMs today this is easy.

CRM is a long-term solution to many problems and can provide strategic advantage to small businesses.

With increased competition, as a small business owner, you need to respond to leads and customers faster than ever. It is quite common that a prospective customer contacts five to six service providers or product suppliers at the same time. The business that responds first to the lead or prospect usually gets the deal.

Also, small business owners store all the lead and customer data on laptops or phones. A laptop can be damaged or your phone can be stolen. In those times, you must not lose the valuable data you have gathered over years.

A cloud-based CRM protects lead and customer data from being lost. Data stored in a cloud server guarantee data safety and provides you with a protective cover against data loss.

# 4

## Signs that indicate your business needs a CRM

Below are top 10 signs that indicate that your small and growing business is in a dire need of a CRM.

If your lead database has more than 1,000 leads

1

If you get more than 100 leads per month

2

If you have a sales team of 5 or more people

3

If you generate good number of leads through your website

4

If you run lead generation Ads in Facebook, Instagram or Google

5

If you get considerable number of leads from WhatsApp or phone calls

6

If your sales force find it difficult to connect with leads

7

If your sales force still use diaries for scheduling appointments or as call records

8

If you do not know what your sales team is busy with each day

9

You have leads but sales conversions are poor

10



# 5

## Avatars of CRM

There are various avatars and types of CRMs in the market to suit specific business needs. CRMs that are developed and sold today usually contain a mix of different flavours and avatars so that you get the best of many things.

Here are few popular avatars of CRMs

- Sales CRM
- Support CRM
- Mobile CRM
- Call CRM
- Operational CRM
- Collaborative CRM
- Social CRM
- Analytical CRM



## Sales CRM

A sales CRM manages all the different touchpoints with customers. It simplifies the overall process by allowing you to track prospects' communication, send reminders for follow-ups, organize customer data, and automate administrative tasks.

## Support CRM

A helpdesk CRM or support CRM is a customer service software that helps you enhance your customer service so you can build stronger and long-lasting customer relationships. Support CRMs help you to address customer issues promptly. Some of the sales CRMs can be used as support CRM as well.

## Mobile CRM

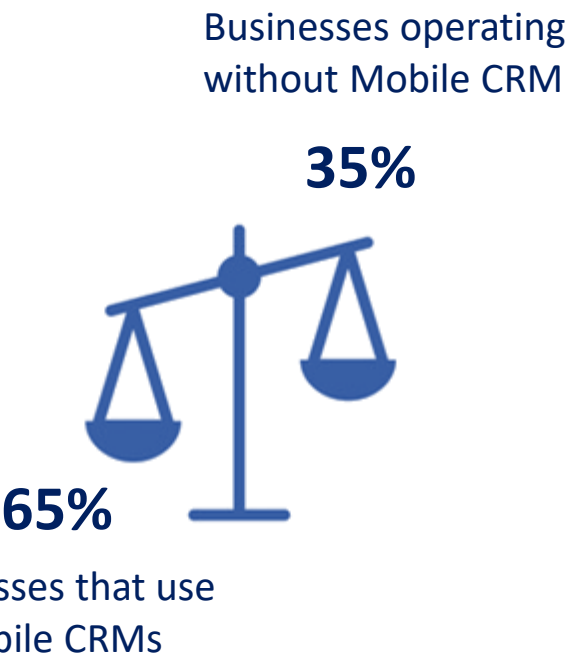
A CRM tool that allows mobile devices to access a CRM application from anywhere. Further, it can generate reports in real-time to help you understand how you can improve sales. Mobile CRMs leverage the power of mobile and can integrate with WhatsApp and can provide call tracking facilities.

## Call CRM

A call CRM helps your sales team to add call information to the CRM automatically. A call CRM can automatically log calls, add new numbers as leads, track time spent in calls, add call information post-calling the prospect, and show key data when a lead or customer is calling. A call CRM is helpful if you use a phone a lot or you have a call center.

## Operational CRMs

Operational CRMs are an important tool for lead generation support and lead management. They automate the processes involved in lead generation, lead tracking, and sales conversions. They are used both in sales and customer support.



## Collaborative CRMs

A team approach to sales is great as everyone can contribute to winning a customer. Collaborative CRMs help in breaking barriers by sharing customer information with your sales team and also finding new ways to enhance sales and business strategies.

## Analytical CRMs

Analytical CRMs are primarily used to analyze customer data which improves customer satisfaction. These are databases with detailed information about customers and processes and provides different views and analysis of lead and customer information..

## Social CRM

Social CRM is the integration of social media channels - i.e., Facebook, WhatsApp, LinkedIn, or Twitter- into a CRM platform. Few notable core features of social CRM include personalized customer profile analysis, social listening, social selling, sentiment analysis, and syncing all social media platforms into a single social CRM.



*“Nobody likes to be sold to.  
But everybody likes to buy”*

# 6

## How to choose the best CRM for your small business?

With a wide range of CRMs available in the market, choosing the best CRM for your small business can be tricky.

We have seen, over time, that we all buy something, but never end up using it – at home and office. CRM should not fall into this category.

You could find much pricier and costly CRM options with a huge list of offerings promising to provide the moon. But remember, a CRM is truly valuable if you use it. Many businesses invest a good amount of money and resources in a CRM deployment, only to see sparse or no use of the tool later.

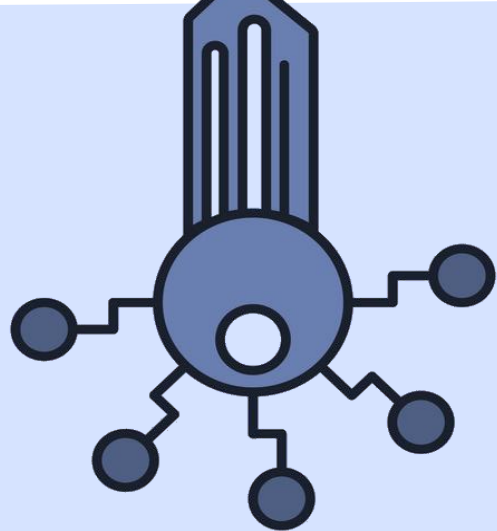
Before choosing a CRM, it is important to have a deep look at your sales process, sales cycles, and understand the needs of your business. Write down the challenges that you wish to solve using a CRM and determine the features that are most important to you, to your sales process, and your business goals before clicking the “buy-now” button.

Here are the top 5 key elements that you need to review while choosing a CRM for your small business needs.



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*A CRM is not just a business expenditure, but a long-term investment for growth.*



## Top 5 Key Elements of a Good CRM

### 1. Simplicity & ease of use

By picking up a simple and easy-to-use CRM, you make sure you will use it and also get buy-in from your sales team. When a CRM is easy to use, your sales team will be comfortable using the tool, and they will use it in their everyday sales activities which in-turn will increase the sales.

### 2. Easy to learn

As a small business, you and your team may not have the necessary time or required motivation to get trained and use your newly purchased CRM. Learning and onboarding a new CRM should be an enabler and not a barrier for your sales team. So, pick a CRM that has an intuitive user interface and is easy to learn.

### 3. Can scale quickly

Many small businesses grow quickly in offerings, sales volume, and customers. The CRM you choose should also be capable of adapting and continuing to fit your business as it grows.

The CRM should be able to scale in terms of user count, transaction count, and response time even when there are a large number of users doing a considerable number of transactions. The CRM should be able to provide you with features that you may not require right now but will require shortly or in the future as your business expands.

## 4. Fairly Priced

Cost is an important factor in the early stages of your business. Start-ups and small businesses need to be careful with their expenses to ensure sufficient funds are available for marketing and to grow their customer base and scale their business.

Being a small business, you may not utilize 60% of the CRM's top-end features. As a result of it, you may end up paying for features that your sales team isn't using efficiently or at all.

As most of the CRMs in the market today are available with a free trial period, go ahead and run a trial or a pilot with a few suitable CRMs, along with your sales team. Invest in a CRM that you believe is fairly priced.

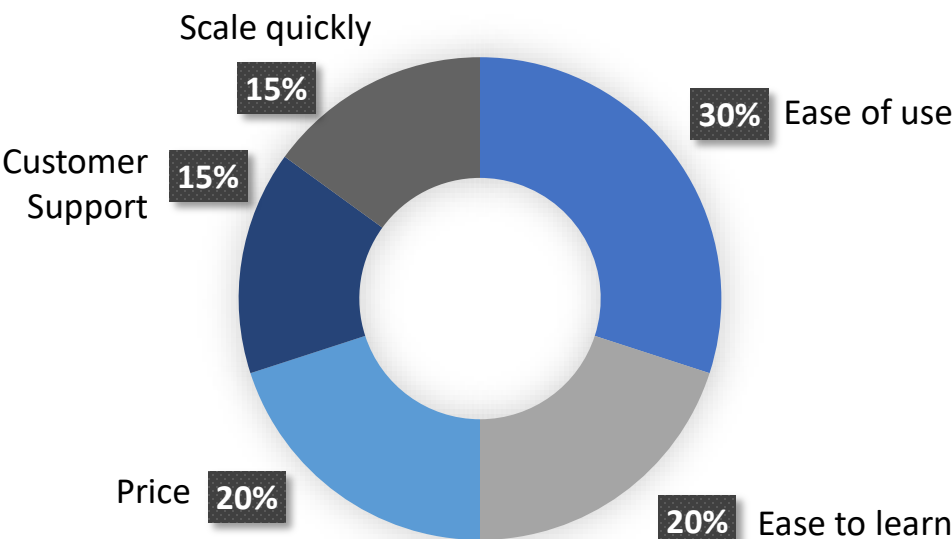
## 5. Good Customer support

Good customer support is another big-ticket item that you should look for in a CRM.

Since your small business has a few and always-busy team members, it is quite helpful if the tool you use offers sufficient support and guidance to get up and run whenever any issue or problem is faced.

Along the way, you could run into some issues with the product, and the support team should be able to guide you and provide you with the required technical support instead of leaving you to Google your way of troubleshooting.

## Key factors that influence CRM purchase decision



# 7

## Must-have features in CRM

Apart from the features that you look for in a CRM, there are a few essential features that your CRM must have to help you and your small business grow and reach new heights.

Based on the size of your business and the industry you operate in, the features you need may vary. However, below are the top 10 fundamental features, that small businesses would need in a CRM.



WhatsApp Connectivity



Comprehensive dashboard and analytics



Rapid lead response by auto-texting or SMS



Email integration



Facebook lead integration



Quotes and Invoices



Team management



File Attachments



Multiple ways to capture leads, prospects and customers



On-time reminders for follow ups

## 1. WhatsApp Connectivity

“In this changing world, it is important that you connect with your prospects and customers using a medium in which they are active”.

WhatsApp has become the most favoured communication channel for businesses. Hence, the CRM you choose should have the ability to let you connect with your prospects and customers using WhatsApp.

Also, many businesses get their sales inquiries through WhatsApp. A CRM that has the capability to capture those WhatsApp inquiries as leads and connect with them quickly will add more value to your everyday sales process and improve sales for your business.

## 2. Rapid lead response by auto-texting or SMS

You must respond to your prospects and customers at the speed of light. Responding to prospects quickly improves the trust and reputation of your business.

As, it is not possible that you have enough time and resources to respond to your customer inquiries and requests every time, a CRM that powers you with the features to auto-respond to your customer via email and text messages will solve this critical issue and will be of great help.

## 3. Facebook lead integration

The CRM you choose for your small business should have the capacity to capture the leads generated from your Facebook lead ads.

A system that could automatically capture every inquiry from Facebook and distribute it to your sales team for further follow-ups, would be a perfect time-saver and productivity enhancer.

## 4. Team management

Sales, like other business functions, is a team sport. In a small business, bringing all your team members to a single platform and allowing everyone to get immediate access to lead data, customer data, and analytics is a key factor for sales success.

A CRM you plan to purchase should provide a high-level sales overview and also ground-level insights to all team members.

A CRM that you choose needs to accommodate all your sales team members. Additionally, the CRM should provide an overview of the sales team's performance, and this can help in monitoring every team member's activity and finding who are doing great and who needs help.

## 5. Adding leads using multiple ways or sources

The world is changing and so are the ways we generate leads. Today’s small businesses get leads from a range of sources.

The CRM you choose should be able to add leads from Facebook ads, Google ads, Websites, WhatsApp, third-party listing platforms, by scanning business cards from expos and tradeshow, from walk-ins, phone contacts, and phone calls.

A good CRM would bring all leads into one central location and bring visibility of data to you and your sales team.

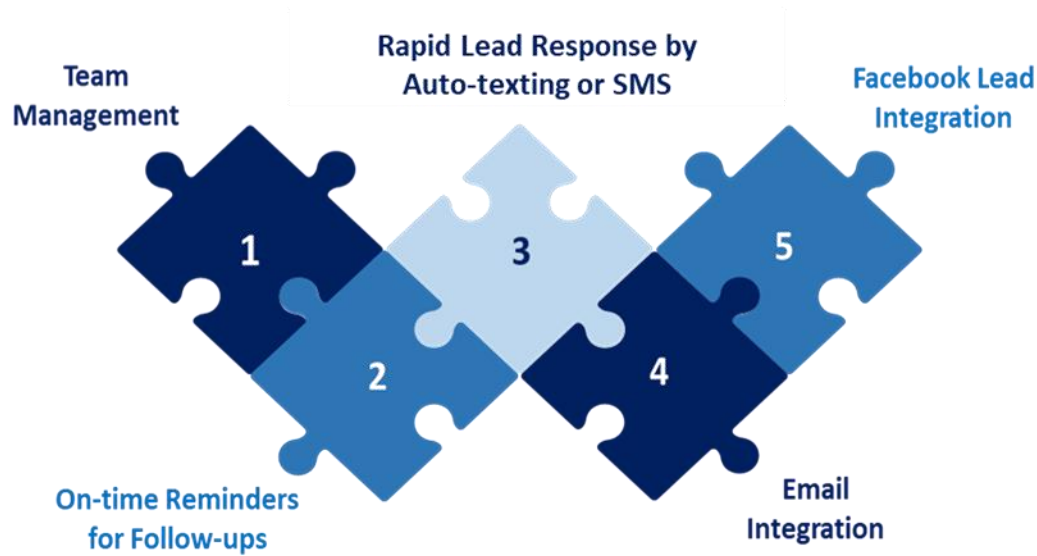
## 6. Comprehensive dashboard and analytics

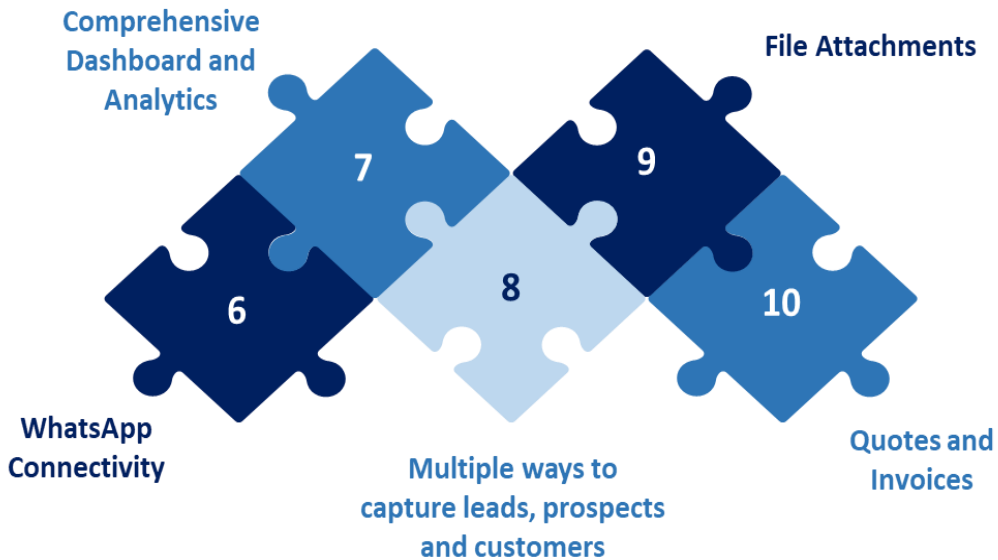
A key capability of a CRM is to give you the results of your effort and to let you visualize the progress of your business.

Based on the business or industry you are part of, the metrics and analytics may vary, but few of the measuring sticks are global and common across businesses.

Some examples of these measuring sticks include (a) how many prospects have been contacted (b) which product or service of my business is gaining more interest from prospects (c) how many customers did we win and lose (d) what is the result of the follow-up calls done by my team (e) how much time did each team member invest in speaking to prospects and customers.

## Top Requested CRM Features





## 7. Email integration

If you have hundreds or thousands of prospects, it is not practically possible for you and your team to call and connect with them individually and this is where email communication helps.

So, make sure your CRM is capable of providing you with an emailing solution and email integration features that can greatly help you to nurture, convert, and win new prospects using emails.

## 8. Quotes and Invoices

The hard work carried out to convert a prospect to a customer finally ends in sharing with them a price quote and later an invoice for them to make a payment.

The CRM which you are planning to subscribe to, if enabled with features to generate price quotes, estimates, and invoices, it will make the sales process easy and quick. It can save time and improve productivity.

## 9. File Attachments

We always have a few things to associate with a prospect or customer which can be a document, an image of the customer's office or their products, or even a recording of a conversation that you had recently.

A CRM should provide a way to add, especially pictures from phones, images, audio recordings, and documents.

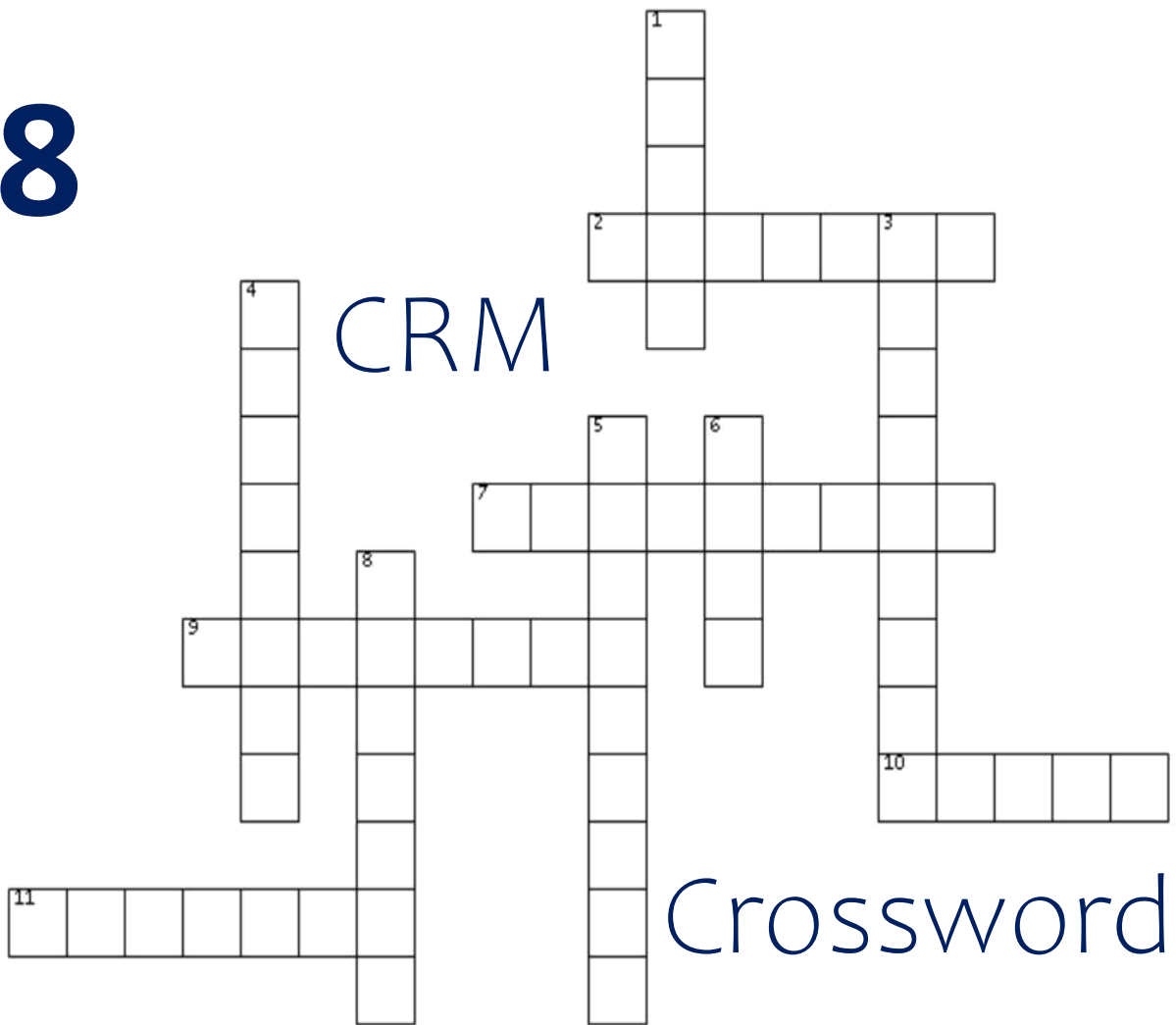
## 10. Ontime reminders for follow-ups

It is easy to miss a follow-up, given the number of things on our to-do list and the number of meetings we do in a week.

A good CRM should be able to alert you about a follow-up using an alarm in the mobile phone in addition to email alerts and other ways of alerting so that you remember to call or contact the prospect without fail.

Take a break!

# 8



## ACROSS

- 2. Segregate good leads from bad ones
- 7. A place where you meet hundreds of leads
- 9. Popular platform for lead generation today
- 10. The engine of your business
- 11. Leads to customers

## DOWN

- 1. Where your CRM application resides, now-a-days
- 3. Your fortune is in \_\_\_\_\_
- 4. A platform to connect instantly with your leads
- 5. Promoting your business
- 6. Together everyone achieves more
- 8. The face of your business

*Answers at the end of  
next chapter !*

# Your Small & Growing Business Needs A Simple CRM



[www.helloleads.io](http://www.helloleads.io)



# 9

## CRM driven best practices



## ✓ Generate as many leads as possible

A small business needs as many good leads as possible at the top of the funnel to improve sales to grow. Lead generation is the process of attracting prospects and converting them into customers who have an interest in your company's products and services. CRMs do help in generating leads by way of email marketing and social media integrations. Though CRMs do not generate leads by themselves, they motivate and encourage you to adopt methods that will generate more leads for your small business.

## ✓ Bring all leads into one place

It is easy to get lost with multiple lead sources. On one hand, your Facebook ads will be generating leads, on the other hand, your team meets people who walk into your showroom. A sales admin can get lost in dealing with lead data from multiple spreadsheets/ sources.

A CRM helps you to get all leads in one central location so that it is easy to access. It makes sure you do not lose sight of important prospects and pipeline.

## ✓ Qualify leads upfront

Determining whether or not a lead is a good fit as a customer is important since it will save you time and effort down-stream. This is done using lead qualification. If your lead matches your ideal customer profile and is deemed likely to purchase, they're considered "qualified," and moved to the next stage in the sales cycle.

Using a CRM, you can qualify leads upfront as high potential, medium potential, low potential, or not relevant. You can add products or services a prospect is interested in, and the customer group or segment he or she belongs to.

## ✓ Score your leads and prioritize

Lead scoring is a CRM-driven methodology for ranking leads to determine their sales-readiness.

Lead scoring is based on the interest, qualifying parameters and, their current place in the sales cycle.

By focusing on leads who have already reached the purchasing stage, the sales team can lead the prospect to complete a purchase. Lead scoring is a best practice and helps you to prioritize high potential and ready-for-purchase leads.



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*You are out of business, if you don't have a prospect – Zig Zigler*

## ✓ Nurture your leads

Many times, you come across leads who are interested or otherwise qualified, but for some reason, they aren't ready to purchase your product or service right now. Maybe they do not have funds or want to complete certain things before buying your product.

In this case, start nurturing your lead to stay on top of their mind when they are ready to buy. A CRM helps in regularly staying in touch with your prospects and nurturing them at each step.

## ✓ Be in touch and follow up

Most often, sales cycles take time and customers do not decide to purchase your product now. So, it is important to keep in touch with your leads and prospects regularly.

Follow-ups are very important in closing a sale. Regular follow-ups indicate that you are interested and keen on understanding the customer's needs and meeting the business needs with appropriate products or services.

A CRM tool enables you to regularly follow up with prospects.

## ✓ Collaborate with your team

You may close a few deals independently but collaboration with the team is key to closing more deals regularly.

For this, you need to bring all your sales team members on the same page and they need to understand the progress of each lead quickly and easily.

Using a CRM, you can accommodate your team members as users and give them the required information and tools to contribute and support the sale process.

## ✓ Measure team's performance

Measuring team's performance is important – how much time each team member has invested and the results of such efforts will determine who in your team are doing great and who need help.

It also helps in identifying the key activities that help in closing more deals. Good CRMs help you to measure and track your team's performance and even help you to gamify the sales process & recognize sales team members for their performance.

### Cross word answers!

- |          |              |              |             |              |             |
|----------|--------------|--------------|-------------|--------------|-------------|
| 1. Cloud | 2. Qualify   | 3. Followups | 4. WhatsApp | 5. Marketing |             |
| 6. Team  | 7. Tradeshow | 8. Website   | 9. Facebook | 10. Sales    | 11. Convert |

# 10

## Your Fortune is in Follow-ups

*A shocking 79% of the leads never get followed up and it is a fact.*

If you need more sales, then you need people to say 'yes' more often than they say 'no'.

Increasing the number of 'yes' over the 'no' is the obvious answer to business growth. But if 79% of the sales leads never get followed up, then there are a lot of lost 'yes' votes.

1. **49%** of sales people stop asking just after one 'no'.
2. **22%** of them give up after two.
3. **14%** give up after getting three 'no's
4. **12%** of sales associates throw in the towel after being told 'no' four times.
5. **So, this means 92%** of us give up after being rejected four times or less.
6. **Only 8%** go on to ask for the fifth time. And they are successful.

Studies say that around 80% of prospects will say 'no' four times and say 'yes' on the fifth. When you consider this, you can spot the obvious opportunities that are being missed.

If you are not in the 8% of salespeople who keep going to the magical number five, then you are missing out on sales and business.

Forgetting to follow up is another the biggest reason most sales leads get neglected or missed out.

As a small business owner or sales manager, you are incredibly busy & multitasking and you can easily forget to follow up with leads.

Without a proper system, the chance of missing to follow up becomes more probable and that's going to cost you money. So how do you make sure you have a failsafe system for follow-ups?

Here are the top 6 ideas that you should look at.

## **1. Assign leads**

Using a CRM system and a digital tool, make sure you assign each lead to a sales team member in your organization.

So, each one in the team knows, which door he or she should knock and for which set of prospects he or she is responsible. Clarity helps and distributing leads helps in sharing the workload.

## **2. Set follow ups**

Once you know who needs to follow up with which leads, the next question is when.

So, review the qualifiers and communication history and decide when to follow up with each lead.

When there is an issue of bandwidth or time, the best is to follow up with high potential leads immediately and leave the low potential ones for bulk follow ups using email or other methods.

## **3. Repeat follow ups**

As the research shows, a lead requires 7 to 8 times follow-ups before they convert to an actual customer.

So, using a good CRM you can set repeat follow-ups so that you can be in touch with prospective customers at regular intervals.

CRMs offer daily, weekly, monthly, quarterly, or yearly repeat follow-up settings. A potential lead may need a daily follow-up and on the other hand, you can touch base with an existing customer every quarter.

#### 4. Did we follow up?

After assigning leads to specific people in your team, setting follow-up dates, and repeat follow-ups, the next question is- did we follow up as planned?

So, it makes sense to review this regularly to figure out what are the key reasons why a lead or set of leads were not followed up as planned.

Maybe there are bandwidth issues or bottleneck issues which need to be addressed.

#### 5. How did we follow up?

What are the best ways to follow up depends on the stage of leads in the sales cycle and their preferences.

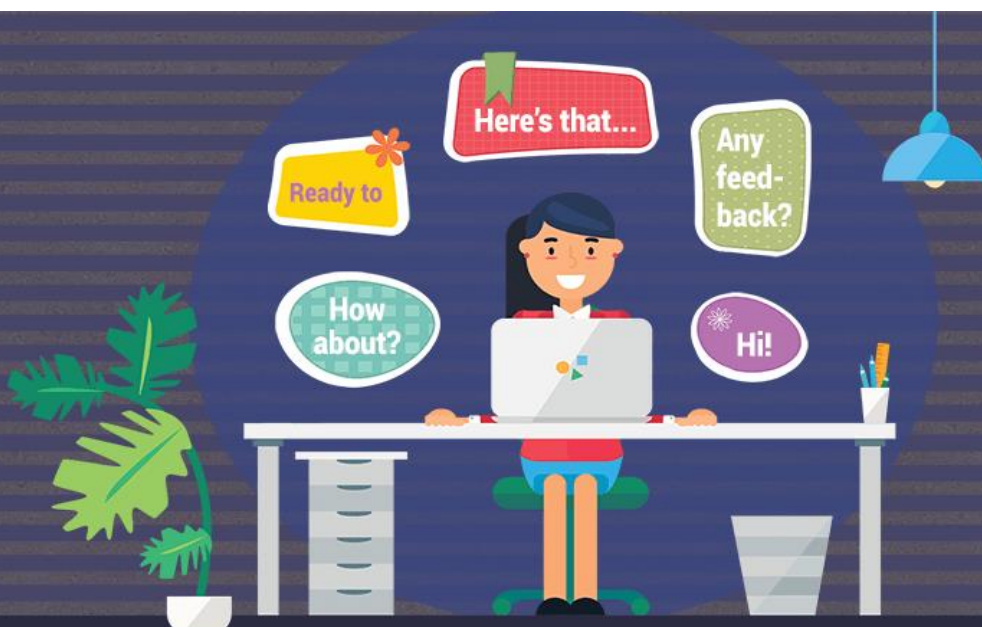
For example, a hot lead can be and should be followed up using telephone or instant messaging like WhatsApp.

Cold leads can be followed up using a bulk emailing methods.

Some prospects do like it when you follow up regularly and some may not. So, you must approach follow-ups with a tone of solving your prospect's problem rather than making a sale.

Don't just stop with telephone or email communications if they do not work. Do try different follow-up methods. People prefer different ways of communication, and what gets one person's attention gets ignored by another.

On the other hand, if someone specifies a particular method of communication, do respect and prefer that.



## 6. Did follow ups result in sales conversions?

Did the follow-ups, the time and effort you invested, result in commensurate sales conversions?

This is something you want to check and review periodically. What is the average number of follow-ups required to make a sales conversion and does this change - product to product or person to person?

These insights can help you to develop sales strategies and a sales playbook that result in better sales conversions for a given amount of time and effort.

Follow-ups are difficult and hence you need a good tool to remind you and keep track of follow-ups. Make sure the CRM you are choosing is a constant companion when you do sales follow-ups.



# 11

## What else can I do with a CRM?

Using a CRM, you can accomplish a variety of things, in addition to organizing and tracking leads.

What else you can do will depend on the CRM you choose for your business. Below are few examples to illustrate the abilities of CRMs to go beyond tracking leads & customers.



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*Researchers say “Spend more in Email marketing program this year because its going to increase the sales by 60%.”*

### 1. Leads near me, check-in and check-out

If you or your team is involved in field sales or meeting customers or prospects daily, locating leads on a map can be very useful.

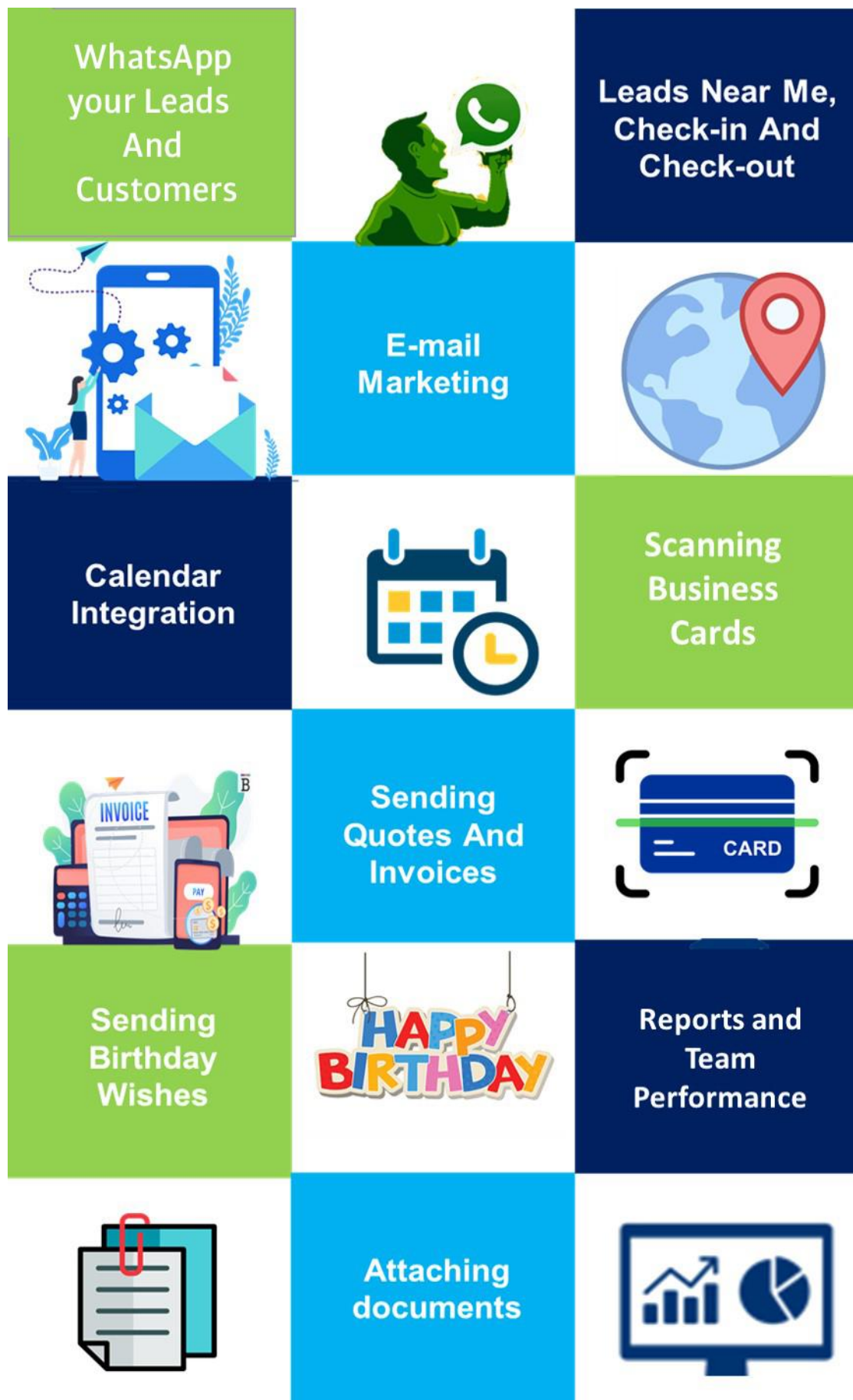
You can identify leads near you, while on travel, get directions, know the time it takes for commute, and plan your day.

You can also use features such as check-in and check-out to keep a track of your visits to customers.

### 2. E-mail marketing

Email marketing functionality of a CRM allows you to reach potential customers by allowing you to send customized emails to many contacts in one go.

This is typically called mass email or bulk email. Some CRMs offer customized templates and the ability to track open and click rates. However, one should be aware that the delivery rate of emails, i.e. how many emails actually reach the inbox of recipients, can vary based on the accuracy of data you have, the IP reputation, and few other parameters.



### 3. Calendar Integration

Google calendar integration, for example, can be helpful if you schedule many follow-up meetings.

This feature can update the Google Calendar with follow-ups assigned to you.

This is useful to plan your time and get a bird's eye view of your day or week. If you have both personal and business meetings or schedules in one place, it helps you plan your week.

### 4. Reports and team performance

A CRM, in general, provides you with certain analytics and reports which help you to make better business decisions in addition to improving sales efficiency.

Also, in addition to analyzing lead and customer data, your team performance can be measured and tracked using a CRM. Examples include how many leads were added by each team member, how many deals got closed by each of the team members, and how many calls were made.

### 5. Sending quotes and invoices

Quickly generating a quote or price proposal on the go and sharing them using WhatsApp is a need of many sales associates.

Some of the CRMs provide capabilities to create quotes and price proposals and this can come in handy for your business.

It is quite likely that the formats of the quotes and invoices may not be the same as the ones you currently use. However, you can add your logo and customize the quotes and invoices to a certain extent.

### 6. WhatsApp-ing your leads and customers

WhatsApp is useful to quickly connect with people including your prospects and customers.

Some CRMs have the ability to switch to WhatsApp from a lead contact page so that you can message them using WhatsApp.

If you are not using the power of WhatsApp, you should consider it for improving sales.



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*At least 82% of companies use CRM for sales reporting*

## 7. Sending Birthday Wishes

How about sending birthday wishes to your customers without fail? This is possible with some of the CRMs.

You can set up customized birthday greetings or even anniversary greetings and set up the CRM to send wishes on a particular day. This can come in handy if you are a consumer-facing business, say real estate or insurance.

## 8. Scanning business cards

If you are into a business that exhibits regularly in tradeshow or expos, then you must be collecting hundreds of business cards of your prospective customers.

Some CRMs provide a way to scan, transcribe and add business cards as leads. This can save a good amount of time and effort for you and your team.

## 9. Attaching documents

You may want to add or attach documents – be it PDFs or images or even a text file – to each of your leads or customers. This is possible in some of the CRMs.

Many CRMs charge based on the storage you will be using. So please check out if you have hundreds or thousands of documents to attach to lead or customer records and its impact on the cost.

## 10. Automation

CRMs offer opportunities for automating some of the regular tasks. For example, HelloLeads CRM offers the capability to send an instant response via email or text to leads you add. Some CRMs offer the ability to do a drip email or text for follow-ups.



# 12

## General purpose or industry specific CRM

### General-purpose CRMs

A general purpose CRM offers functionalities and features that can be used by a range of organizations in different industry verticals.

These CRMs offer a general purpose or universal tools for sales, marketing and customer support and can be configured, to a great extent, to suit your specific industry or organizational needs.

General-purpose CRMs can be integrated with a range of third-party applications for capturing leads and to transfer data for other business purposes.

Most CRMs have fundamental features like contact storage, lead tracking, and opportunity management. Over time, CRMs have evolved to meet the specific needs of each industry as well. There are general purpose and industry specific CRMs in the market to meet evolving needs of businesses.

### Industry-specific CRMs

As against general purpose CRMs, industry-specific CRMs offer specialized features and functions that are designed to meet specific needs of a given industry or segment of businesses.

Real Estate CRM, Insurance CRM, HealthCare CRM, Hospitality CRM or Call center CRMs are examples of industry-specific CRMs.

It is possible some general-purpose CRMs can meet your current business needs better than an industry specific CRM. So, it is prudent to evaluate and do a pilot before you decide to purchase a particular CRM



## Real Estate and Mortgage CRMs

CRMs designed for real estate businesses address the needs of this industry. Good website integration and integration with property portals are key for the real estate industry to get leads instantly. You distribute leads to agents in your company quickly and they will be paid commission for successful closure of deals.



## Auto Dealerships CRM

Auto dealership can range from small to large and CRM needs could differ. Basic CRMs for auto dealerships can address the needs of lead management and tracking and complex CRMs can take care of customer finance and dealership management as well. Tracking a visit of a prospect to car showroom, handling test drives and making successful closure are key in auto dealerships.



## CRM for Insurance companies

Insurance agents, financial consultants and brokers are known for multi-tasking – calling clients, scheduling appointments and closing deals all at the same time. Many insurance firms and financial & investment consultants use CRMs to improve their customer tracking and improve the business.



## CRM for Construction Companies

CRM for construction companies or a contractors' CRM helps in streamlining the processes. It eliminates the struggles to get information by searching emails, physical paper files and excel sheets. CRM can help in keeping all data in one place & up to date and can help in proposal management and work order management.



## Hospitality CRM

Hospitality CRM or a Hotel CRM is a single source of truth for guest information. It helps in hospitality services, such as restaurants, event planning, and hotels. Hospitality CRM should have the ability to store guest preferences and schedule reservations or bookings. Hospitality CRM should enable nurturing client relationship.



## CRMs for Accounting Professionals

Accountants, bookkeepers, and finance staff in an audit firm or CPAs need a CRM to keep a track of customers and to manage billing using a centralized system. The features that would be of interest to this segment of customers is centralized client data, keeping a track of conversations, billing and invoicing and payment follow ups.



## CRM for Startups

Startups just have few people but end up doing tons of work. Startup CRMs should have rich functionality to match the appetite of founders, ability to scale as business grows. CRM for Startups help to move from multiple ways of managing leads and customers - post-its, spreadsheets, emails, and phone calls – to one single tool.



## Small Business CRM

Small business is a challenging environment where you are growing faster and everyone else, including a CRM, should come up to your speed. Small Business CRMs should have the capability to get leads from a range of sources – websites and Facebook ads and have the ability to track them. Visibility to performance of your sales team is key for growing fast.



## Call Center CRM

A Call center CRM enables you to distribute a large number of leads to your team so that each one can call, follow up and generate business. Call center CRM should have call tracking so that you can log incoming and outgoing calls. Also, some CRMs offer an integration with a IVRS (Interactive Voice Response System) so that call recording and number masking are available to you.

## CRMs for Nonprofit organizations

A nonprofit organization or NGO or non-governmental organization has very similar needs that of a for-profit-organization when it comes to managing and tracking donors. Each donor or contributing person need to be captured, tracked and followed up. Nonprofit origination has a set of members who are responsible for following up with a given group of donors and managing projects.

## B2B CRM

B2B is a business that caters to the needs of other businesses. B2B CRMs give businesses the ability to manage multiple relationships and have the ability to keep a track of conversations with multiple people in the same organization. B2B CRM need to have strong user management and team collaboration features.

## B2C CRM

Business to consumer CRMs place an emphasis on functionality and features designed to manage leads and direct customer engagement sales channels for any industry. Retailers, call centers, Insurance agents, financial consultant and real estate agents fall into the B2C category when one deals directly with individual customers or consumers.

# 13

## Key CRM decisions & CRM Cost

### On-prim or cloud

Earlier, CRM systems were deployed on the premise and ran on servers within an organization. These were termed "on-premise CRMs" or "on-prim" for short.

However, over the last few years, CRM systems have become available as a cloud-based solution.

### Make or buy

Make or buy; now or later are some of the questions that come to your mind when you want to deploy a CRM for improving productivity and sales of your small business.

Should I buy standard off-the-shelf CRM or build a customized CRM for my business is a common question for many organizations including small businesses.

The cost will also depend on such key decisions. Making a CRM for your specific needs and maintaining it, is complex and costly but might meet the specific needs of your business.

On the other hand, using a cloud-based SaaS CRM can save money & resources and can go live in a matter of days but you embrace a standard process offered by the CRM.



**87%** of CRMs are cloud-based

Cloud CRM, also known as Software-as-a-Service (SaaS) CRM is hosted in the cloud and can be accessed from any device through the internet, enabling users to access the same information at the same time from anywhere.

The data in the cloud CRM resides on the CRM provider's servers or on third-party cloud database such as AWS or Azure or Google Cloud.

With rapid changes to technology and the availability of good internet bandwidth, it makes sense to go for a cloud-based CRM, especially for small and medium businesses.

### Monthly subscription fee

Most of the CRMs today are cloud-based and subscription-based and come with a SaaS model (Software as a Service).

This means, instead of a one-time large payment at the time of purchase, you typically pay a monthly or annual subscription fee for your usage.

The monthly or annual subscription fee typically is per user and also has a limit on the space you use or the number of records you can store on the cloud.

The subscription fee will differ from plan to plan for a given CRM. When you pay annually you can save 15-20% compared to what you pay when it is monthly.

### Free CRMs, Trial Plans and Free Plans

There are CRMs with trial plans which offer all features during a trial period of 14 days or 28 days.

Also, some CRMs are either free or come with a free plan. Free plans are usually limited by the number of users, capacity (records or storage), and maybe with restrictions on some key features.

Such free plans are usually suitable for solo entrepreneurs or new businesses with very limited leads or customer records and who has a limited budget for deploying a CRM

### Mid-range CRMs

Mid-range CRMs are moderately priced, ranging from \$ 5 to \$ 50 per user, per month.

These CRMs contain enough features and processes to take care of most of the small business needs.

"We are still not sure what happened here, but I think we can agree that we are glad it's over."



Mid-range CRMs are suitable for small businesses with a team size of say 2-500+. Small businesses get a good amount of business benefits by adopting a mid-range CRM for their sales and support functions.

### High-end CRMs

High-end CRMs are usually complex and contain a large number of features, many customization options, and workflow configurations.

The pricing of these high-end CRMs runs more than \$ 50 or \$ 100 per month and is usually used by multi-national or large business organizations that need a large number of features to meet their business needs.

It is not uncommon that even large businesses at times use a mid-range CRM for the sake of simplicity and try and achieve certain other functions using their pre-existing enterprise software.

### Additional costs

You should not be surprised if some CRMs charge additional costs for using certain features or additional facilities they provide.

Also, keep in mind, all cloud-based CRMs need a good and stable internet connection and hence there will be a cost for the internet bandwidth as well.

Many of the sales team members will use the CRM in their mobile phones and hence you may have to spend money on mobile phones and mobile subscription plans.

Some of the CRMs charge additional fees for training and premium customer support or a 24 X 7 support.



*Small businesses looking for a good CRM that is simple, easy to use, quick to deploy and fairly priced should check out **HelloLeads CRM.***

*Small and growing businesses find good value in using HelloLeads CRM for their business needs. [Sign up for a free plan](#) and [request a demo today.](#)*

# 14

## How do I get leads?

Out of the twin challenges for any business - Getting enough leads and converting as much leads as possible to customers - CRMs help you in addressing the second challenge.

CRMs help you to qualify leads and assist you in converting leads to customers as quickly as possible.

CRMs or the CRM companies usually do not provide leads directly.

Then where do I or my business gets leads from? Here are top 10 ways to get leads for your small business.

### 1. Website

#### ***“Make a Big First Impression with Your Website”***

Website is face of your business and it is the first place where your prospective customers read and understand about your products & services offerings and the purchase decision takes place here. So, the website should make a Big First Impression. Create visually attractive, customer-friendly, and information-rich websites with many landing pages. Make sure to have an enquiry form, so the leads will have a way to reach you.



### 2. Email Marketing

#### ***“Move to a more personalized environment -> Inbox”***

Emails are considered an easy and cost-effective way to introduce your product to your target audience. To have a good response to email campaigns, a good amount of effort needs to be taken in framing the content - subject and body of the email.



## 3. Social Marketing

***“Know them and make yourself known”***

Through Social media marketing platforms such as Facebook, YouTube, Google search, Instagram and, Twitter, you can showcase your products & services. Social media marketing drives a type of web traffic that are actively seeking your information. They may even be ready to buy your products or services immediately.



## 4. Content Marketing

***“No matter what your business is, content matters”***

Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract a well-defined audience. There is a huge demand, for high-value contents. If you meet that need, your users will trust you. The trust will turn into a purchase later.



## 5. Blogs

***“Blogs make your business findable via Google”***

Blogging can be an effective lead generation strategy. Blogs are a great way to increase your web presence, making you more visible and “findable” via Google. Blogging is the heart of content marketing and enables you to connect with millions of people around the world by talking about challenges they face and the kind of solutions that can solve the challenges.



## 6. Webinars

***“Get your audience more engaged”***

Webinars enable businesses to reach prospects beyond geographical boundaries and still provide a face-to-face meeting experience with your prospective leads. This is another technique to expand your customer base that will not take much of your time budget. Webinars add value to your prospects and hence it is a win-win.



## 7. SEO or Search Engine Optimization

***“Make your business discoverable”***

Search engine optimization is the process of increasing the quality and quantity of website traffic by increasing the visibility of your website. SEO attracts traffic to your websites and is ideal method for generating leads particularly through organic web searches. It is one of the most effective tools for lead generation.



## 8. Videos

***“A video is worth a million words”***

Using videos to market your product or services, increases the engagement of leads on your digital and social media channels, educates your customers, and reaches your audience through a new medium. Having videos on your website retains your visitors longer than they used to be only when the video has text and pictures.

## 9. Conferences & Events



*“Make an impact one on one & face to face”*

To have a physical presence, to give a brand awareness and display your products directly to the public, events and tradeshows will be a good option. Depending on the event and the amount of coverage it receives, your business may be able to nurture both quality and quantity of leads.

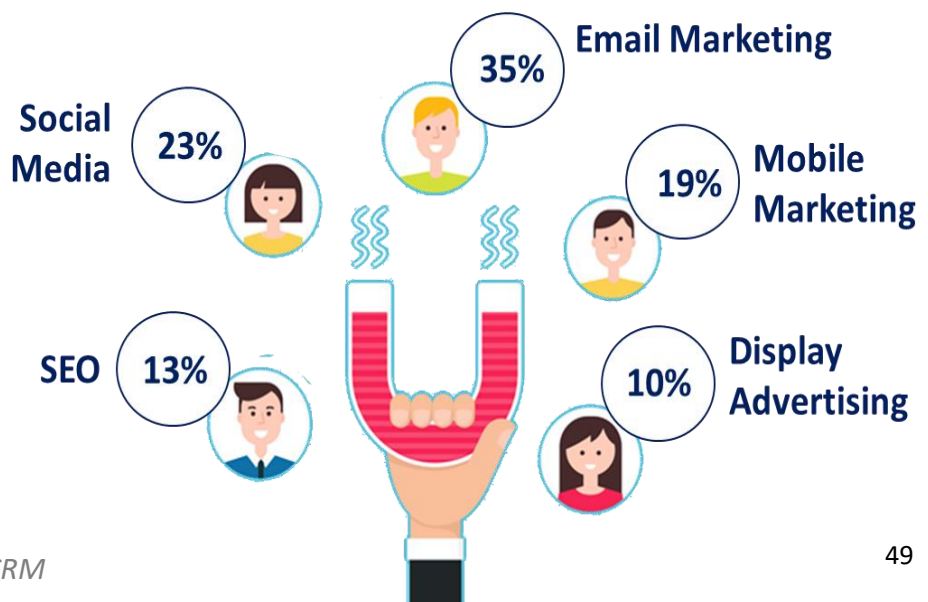


## 10. Viral Marketing

*“Last but not the least”*

Viral marketing is a process of getting your existing customers to refer others to your product. Though this cannot be the only way to improve your business, this can be used as one of the ways for business development. There had been few cases, where this has become a prime winning method over all the other marketing methods.

### Top 5 Marketing methods - You need to look at this year



# 15

## Buyer's CRM checklist

If your organization is thinking of purchasing and deploying a CRM for improving sales productivity & to enhance business growth, we would recommend reviewing and filling this questionnaire.

Answers to the questions, will help you to understand more clearly your current sales processes and will trigger thoughts on how best to use a CRM for your small business.

You can share the filled in questionnaire with your CRM vendors or business consultants or so that they can suggest best product and best plans that matches your business needs.

### CRM Champion

1. Your Organization Name
2. Your Name
3. Who is the CRM Champion or CRM owner in your organization?



## **A bit about your business**

4. Your Industry Category
5. What products or services you provide?
6. Number of people involved in sales
7. What are the top 3 business challenges that you wish to solve using a CRM?

## **Current Systems**

8. What tool(s) do you use to manage leads and customers today? (ERP, CRM, XL, Paper-based systems, phone, Apps)
9. Have you used a CRM before?
10. If your answer to the above question is yes, please name the CRM(s)

## **How do you want to use a CRM?**

11. How many users would you like to have in your CRM - Your sales team members, managers, administrative assistants?
12. What is the number of leads/ customer records you would like to manage in a new CRM in the next 1-2 years' time frame?

## **Sources of lead or customer data**

13. Where do you store your past leads and customer data (for example excel sheets, existing CRMs; phone contacts)?
14. What are your main sources of leads / new customers today (for example, Website, Facebook leads, expos, walk-ins, etc.)?
15. Are your lead and customer data in one place or distributed with multiple people?
16. How many existing leads or customer data do you have and in what all formats?

## About users of the application

17. Describe your users (proposed users of CRM): Are they your own sales team members or dealers or franchise?
18. Are your users spread across different geographies or regions?
19. Do you have any organizational structure (by geography or products)?
20. Do you need any authorization to be set up for users? For example, User X should not see User Y data. User Z should see all the data and so on.

## Grouping data or information

21. How do you group your leads/ customers today? Do you have predefined customer groups (ex: MNC, SME, Large Business, Government customers, etc.)?
22. What are the high-level product or service groups that you offer to your customers? This is not a detailed list of products or SKUs, but a product group or category.
23. Business flow, that is, how leads go from one stage to another, and what are the current stages in sales conversion (open, contacted, qualified, customer, etc.,)?
24. How do you usually group leads – say Website leads, expo leads, leads from field visits, and so on?
25. How do you currently communicate with your leads and customers? What are the top 2 channels (face2face, Phone Calls, email, SMS / Texts, WhatsApp, voice mails, etc.,)?
26. Review a list of 25 sample leads or customer data in your system with a proposed CRM. Are you able to map all the information to the new CRM?

## Jobs to be done

27. What functions or jobs do you wish to accomplish using a CRM? - Marketing/ Email marketing, Digital marketing/ Google/ FB Ads, Lead Management, Sales Follow-ups, Quotes and Invoices generation, Order management, Accounting, Team tracking, Team performance tracking, Tracking visit of sales associates, etc.

- 28. Have you used, are using, or planning to use any marketing/ emailing software? What purpose does it solve and how frequently do you use it?
- 29. Do you use any tools for creating quotes and invoices?
- 30. Do you track physical visits of sales team members to your customer premises? or would like to?

## **Platforms (Web or Mobile; Android or iOS)**

- 29. Which platforms would your sales team members use to access CRM and its data? Describe the % split between Android, iOS, and Web users.

## **Working with other systems**

- 30. Do you plan to integrate the proposed CRM with any other enterprise systems? Example: Emailing systems, Telephony Services, ERP, Accounting, etc.

## **Language**

- 31. What is the language that your users are comfortable with? Does the proposed CRM have your language?

## **Reports, KPIs**

- 32. Do you have any specific reporting needs? Example: Daily sales report emails, Sales insights within the app.
- 33. List a few critical parameters that you monitor today or wish to monitor using a CRM