



CRM from A to Z. How to choose the right CRM for your business

Written for you by NetHunt CRM team

Why we decided to write this ebook?

NetHunt has been operating as a Gmail-based CRM software designed for small and middle-sized businesses. It's a productivity tool inside Google Apps that covers a full set of features to manage leads, nurture customer relations, monitor sales progress, and close deals right in the inbox.

Since 2016 our team has helped hundreds of companies to successfully integrate NetHunt CRM into their businesses. Even though these companies represented different industries (from ecommerce to real estate to educational courses), all of them had similar requirements to what they wanted to gain with the help of the CRM system. They aspired to solve similar problems, they had similar questions and they also made some similar mistakes on their way to complete CRM adoption.

To create this ultimate guide we analyzed the most common requests, challenges and frustrations that may appear when teams start their journey using CRM software. This ebook will not only help you choose the right CRM for your business, but it will also guide you through all the stages of its implementation into the workflow of your team. It offers a clear CRM-implementation strategy that is applicable to any kind of business.



Andrei Petrik,
CEO at NetHunt CRM

“At NetHunt, we believe that maintaining customer relationships takes more than just sending a follow-up or calling your client once a month. To take proper care of every customer, we have to remember every single detail of their journey, every query and request. Hence, the whole team is involved in managing relationships with customers, including sales, marketing, and customer support departments. Successful collaboration of the whole team can only be achieved with a proper tool – a suitable CRM system.”

You can find out more about the company and our product at nethunt.com.

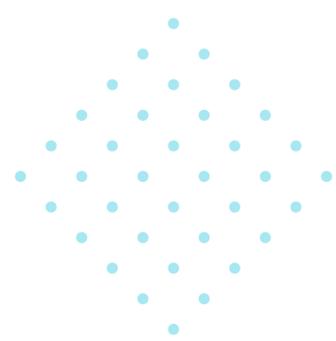
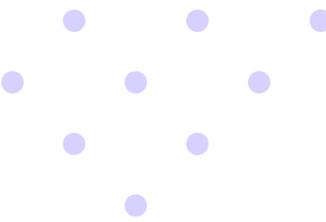


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Part 1. CRM Theory

What is a CRM system?

Before we move any further, let's try to define Customer Relationships Management in general and CRM systems in particular. Even though the CRMs are vital to any type of business that involves the sales process, [22% of salespeople](#) still don't know what CRM is.

Customer Relationship Management (CRM) is an approach to manage the company's interactions with current and potential customers. This means that by using particular software and techniques, businesses may engage with new clients and retain existing ones.

CRM systems are specific software that may be used to store customer data and make use of it. They help employees manage client relationships, gain valuable insights into business processes, and facilitate cooperation in a team.

Who needs CRM software?

CRM systems are [mostly used by sales teams](#) (80%), but other departments can also benefit from them (marketing – 46%, customer support – 45%, IT – 21%). Let's take a look at how CRM software may assist every aspect of the business.

Sales teams

As soon as the team starts using a powerful CRM, their performance skyrockets. According to [Salesforce](#), **CRM may increase company's sales by up to 29%**.

The Nuclear's research [stated](#) that the **average ROI for CRM is \$8.71** for every dollar spent. With the proper CRM sales teams

- ❑ Get their database of clients and leads organized;
- ❑ More often and quickly turn leads into clients;
- ❑ Synchronize Gmail activity with the sales processes;
- ❑ Provide excellent customer experience;
- ❑ Store and access every moment of customer interaction with the sales team;
- ❑ Schedule follow-ups and bulk email campaigns and more.

**CRM may increase
company's sales
by up to**

29%

Most CRMs provide precise analytics which may also be applied in various ways. Due to such insights, salespeople get a better understanding of which communication strategies work and which ones don't. In turn, they may adjust their sales pipelines and workflows for the best possible outcomes.

[Yanina M.](#),
Sales Assistant &
CRM Manager

“NetHunt is designed with sales managers in mind and it shows. There are many things that make my sales process easier to manage and email integration is the primary one.”

Marketing teams

CRM naturally fits into the workflow of any marketing department, improving lead generation and optimizing remarketing campaigns. The team may get all the customer data they need to create personalized bulk email campaigns and keep track of their performance. Besides, they can easily segment their clientele to target the right audience.

CRM software also facilitates the alignment between Sales and Marketing teams, helping their cooperation and, thus, improving the results of both departments' work.

Customer Support

In a typical customer support team, none of the employees can be assigned to particular clients. But still, they need to keep track of all the customers, their purchases, and their issues in order to be able to respond to incoming requests in the most efficient way.

So what does a CRM do in this situation? It works as a data hub, storing all client records and linking related data. Different Customer Support Representatives may lead the same client through several channels: email, social media, or by phone. The best part is that all this information, along with client data, will be automatically linked to one record in a CRM system. It is fast, secure, and saves you a lot of headaches down the line.

Average ROI for
CRM is

\$8.71

for every dollar
spent



Human Resources

In the case of HR managers and recruiters, CRM works as a massive database of employees, applicants, and potential team members. The CRM system helps them manage all stages of the recruitment process and track professional performance for every member of the team.

With CRM, HR Specialist can also automate things like birthday greetings or work anniversary wishes and even set event reminders to be sent via email.

Another great purpose of integrating CRM into HR department is the ability to organize personnel reserve of the company's potential employees.

Management

CRM systems also facilitate the process of managing different teams. Managers benefit from analytics as well as their staff. They can measure employees' productivity and see how well they achieve their individual and team goals. It allows them to find new ways of motivating their subordinates as soon as they need it. Besides, by using a CRM system, they may identify some bottlenecks in the workflow or the team, and target these at a later time.

The key benefits of using a CRM

Better data organization

CRM is, in the first place, aimed at putting all customer data in order, so that your team may use it at any time and in any way they need. Well-organized data leads to faster and more efficient workflows.

[Ovidiu S.,](#)
Freelancer

“I can finally organize my conversation threads with my clients in a way that is sane and efficient. No more frantically digging through my GMail folders to look for that piece of info lost in a completely unrelated

Improved customer experience

As sales managers and customer support teams start using a CRM system, the overall customer experience will improve rapidly. Employees get essential data in hand as soon as it is required, so that they may help customers fix issues fast and lead them down the funnel more effectively.

Better team collaboration

CRM systems help different departments in one company work as one team, cohesively and smoothly.

[Scott M.S.,](#)
Inspector at Global
Aerospace Logistics (GAL)
& Volunteer with the BSA

“I use NetHunt to coordinate communications and annual planning among volunteers across 3 continents. This product has allowed me to dump spreadsheets and the need to email them and request updates. My team keeps the records updated and we all stay on track.”

Efficient sales and remarketing

CRM software helps salespeople lead prospects down the funnel and organize effective remarketing campaigns aimed at specific segments of the clientele.

Automated everyday tasks

CRM systems help employees automate the majority of their everyday tasks. These tasks may include email marketing, follow-ups, deal recording, lead management, etc.

Increased revenue and cost savings

If chosen correctly, a CRM system may put an end to any poor working practices and significantly boost team performance. This will influence the company's revenue and save funds along the way.



Signs that you need a CRM

- You have a low conversion rate;
- You can't retain customers;
- You lack analytics and have to make decisions based on your gut feeling;
- You can't find necessary customer data when you need it;
- You forget to send follow-ups on the prospects and existing clients;
- You have no clue about the client's history when they turn to you for help;
- You don't know which features or products your leads/clients are interested in;
- You can't understand what your employees spend their time on;
- Your sales processes are too slow and complicated;
- You can't build a mailing list and send out email campaigns fast;
- You have contradicting customer data stored in different places;
- Your team members can't communicate effectively and work closely on closing tasks.

PART 2. Preparation to CRM Implementation



Define your company goals

The first question you have to ask yourself before choosing a CRM system is what you would like to achieve with its implementation. It is best to focus on the problems that your company is facing at the moment and start from there.

Remember: select only a few goals that can be achieved by implementing a CRM, don't spread yourself too thin.

Still, defining your company's issues is not enough. To estimate the results of a CRM implementation, you have to set specific goals, which will help you stay on track and get the most out of the CRM. We highly recommend that you set SMART goals: Specific, Measurable, Achievable, Relevant, and Time-bound.

Select the departments that will use a CRM

As it was mentioned above, you may use a CRM not only for the Sales department but also for other teams. That's why you should perform primary research within the team: find out which departments need to use a CRM and how they may apply it. Get some information and feedback from your employees, but don't try to implement the CRM in all the departments. It is better to start with one department and scale as soon as some employees fully adopt the software.

Remember: never decide on your own how your employees will use a CRM. It is much better to solve such issues together with the team.

First, identify your employees' goals for using a CRM. Are they going to use it for improving overall performance or are they going to use it to focus on some specific problems? What tasks would they like to automate? Are there any must-have features they'd like to see in the future CRM?

It is also a good idea at this point to create a dedicated CRM team if you feel that you may require additional assistance with customization or adjustment of the existing system. Such a team may include a CRM admin, a couple of developers who will take care of the technical part of the process, and any other specialists that you feel might come in handy.

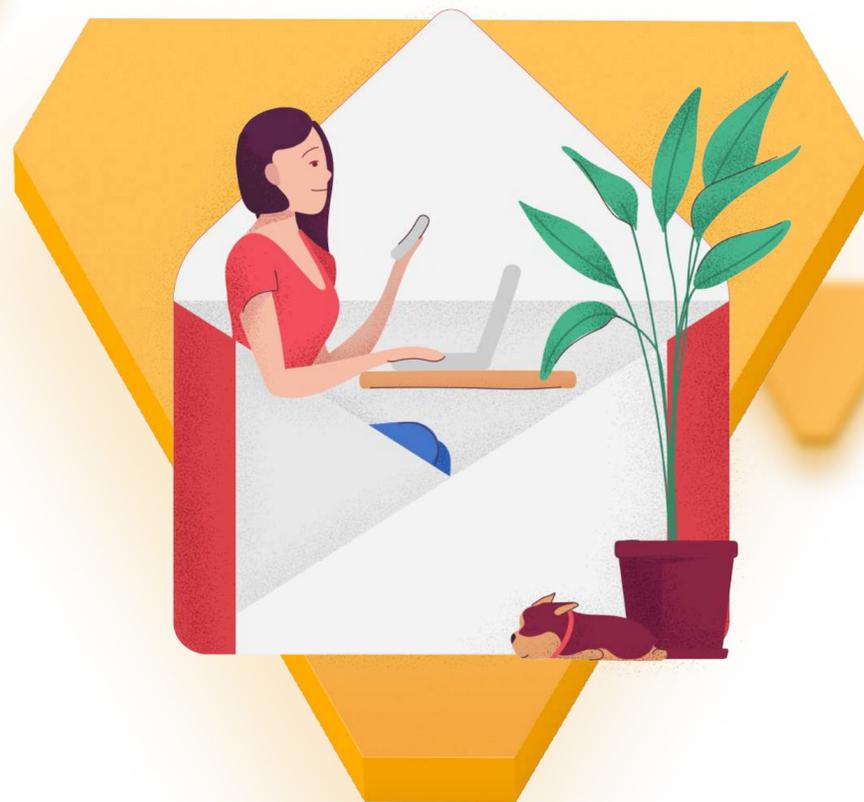
Plan your budget

It's better to think through your budgeting before you start choosing a CRM, and you should definitely do it before implementing one. When it comes to money, consider not only the CRM pricing but also the hidden costs, and also the funds that you may spend for system support.

Identify must-have features

Create a list of must-have features that you'd like to see in your future CRM software. These may include: necessary integration, automation opportunities, etc. Again, don't think of the must-have features on your own, consider the opinion of all team members and make the final decision together.

We've compiled a short list of must-have features for a sales team that you may find useful if you want to focus on a CRM for sales.



Must-have CRM features

Must-have CRM features for a Sales team

- Sales pipelines
- Customizable fields
- Data import/export
- Data reporting
- Team performance statistics
- Essential integrations: Slack, web forms, invoices, software for calls, social media, etc.
- Mobile apps for iOS and Android
- Automation
- Task management
- Notifications and reminders
- Invoicing
- API
- Mail merge

Must-have CRM features for a Marketing team

- Bulk email campaigns
- Email templates
- Customization
- Data import/export
- Marketing reporting and analytics
- Team performance statistics
- Essential integrations: web forms, software for calls, social media, etc.
- Lead generation tools
- Mobile apps for iOS and Android



Must-have CRM features

Must-have CRM features for a Customer Support team

- Ticket generation
- Customization
- Knowledge base
- Data import/export
- Data reporting
- Team performance statistics
- Essential integrations: Slack, web forms, software for calls, social media, online chat, etc.
- Mobile apps for iOS and Android
- Automation
- Task management
- Notifications and reminders
- API

Think through third-party integrations

There must be some useful tools that your business just can't live without. If you don't integrate them with a CRM system, your employees may neglect the new software and stop using it after a while. For this reason, you have to make sure that the CRM you are going to implement supports integration with all your favorite tools and channels.

We highly recommend that you create a list of all the essential integrations beforehand, just to make sure that your CRM isn't missing anything.

Take care of the future

Are you going to grow your team in the future? Well, the chances are high that you do plan on scaling. That's why it would be a good idea to consider your plans for the future when choosing a CRM system. Look through all available options and make sure to select the one that matches your growth and allows you to add new users at a reasonable price.

Besides, check the CRM for any restrictions. For instance, some systems have a limited number of records available in different plans. Make sure your future CRM will allow you to input all the necessary data whenever you need it. Otherwise, you may need to change the CRM software and go through the time-consuming process of data migration.



Part 3. Choosing a Suitable CRM System

Conduct research

As soon as you've completed all the previous steps, it's time to start choosing a CRM that will match all your requirements and meet your expectations. The first thing that you have to do is conduct research looking through all the options available on the market. This way, you'll be able to filter out all the unsuitable CRMs and focus on the ones that meet your requirements.

Some of the aspects that you need to consider during the research include the size and the type of your team, the industry you work in, the type of the CRM, etc.

Pay extra attention to real user reviews. This will allow you to find some possible pitfalls that you might have missed while testing a CRM for just a week or two.

Some of the noteworthy websites with CRM reviews include **g2.com** and **capterra.com**.

Get a Free Trial

Hopefully, at this point, you have narrowed it down to just a few CRM systems that fully match your demands. So now, what's the next step? Test them!

The best possible option is to start a free trial and check them all out one by one. Try not to rush into implementing the first CRM that you like, but rather involve your team in the testing process. Upload some sample data or use real customer information to see which software your team likes the best. This way you'll be able to make a well-grounded unbiased decision.



Test Customer Support

Another important aspect of any CRM software is its customer support team. You need to feel completely comfortable talking to customer support representatives. The communication should be fast and effective at all times.

We highly recommend that you have several online chats with the CRM support team, schedule a demo with them, or just have a call in case of any questions or issues. Find out if it is possible to have a dedicated support manager, and also if they are easy to talk to as well as helpful when it comes to some unexpected problems.

Identify the true cost of the CRM

We've mentioned it before, but it's important to emphasize this point: identify the real cost of the CRM system that you'd like to implement. The thing is that sometimes the pricing indicated on the website doesn't cover all the available features. Some hidden costs may include different integrations, customer support, custom development, etc.

Import sample data

When testing suitable CRM systems, don't forget to import sample data. It's not enough just to install or sign up for a CRM, you have to see how it works for your company. The best option is to upload some of the customer data that you already have. But if you don't have any or you are not sure if you can entrust some confidential information to a third party, just use sample data. You can quickly generate some sample data on the web, for instance, using **mockaroo.com**.

Sample data for import

Customer record

First name: Monica
Last name: Gellar
Title: Chef
Company: Gellar Catering
Manager: Rachel Green
Email: bestchef@gcatering.com
Phone number: +1(212)1234567
Social media: fb.com/monicagellar

Company record

Name: Central Park Cafe
Status: Prospect
Lead source: Email
Manager: Rachel Green
Email: centralcafe@gmail.com
Website: centralparkcafe.com
Phone number: +1 (212) 535 1234
Address: 199 Lafayette Street
Social media: fb.com/centralparkcafe

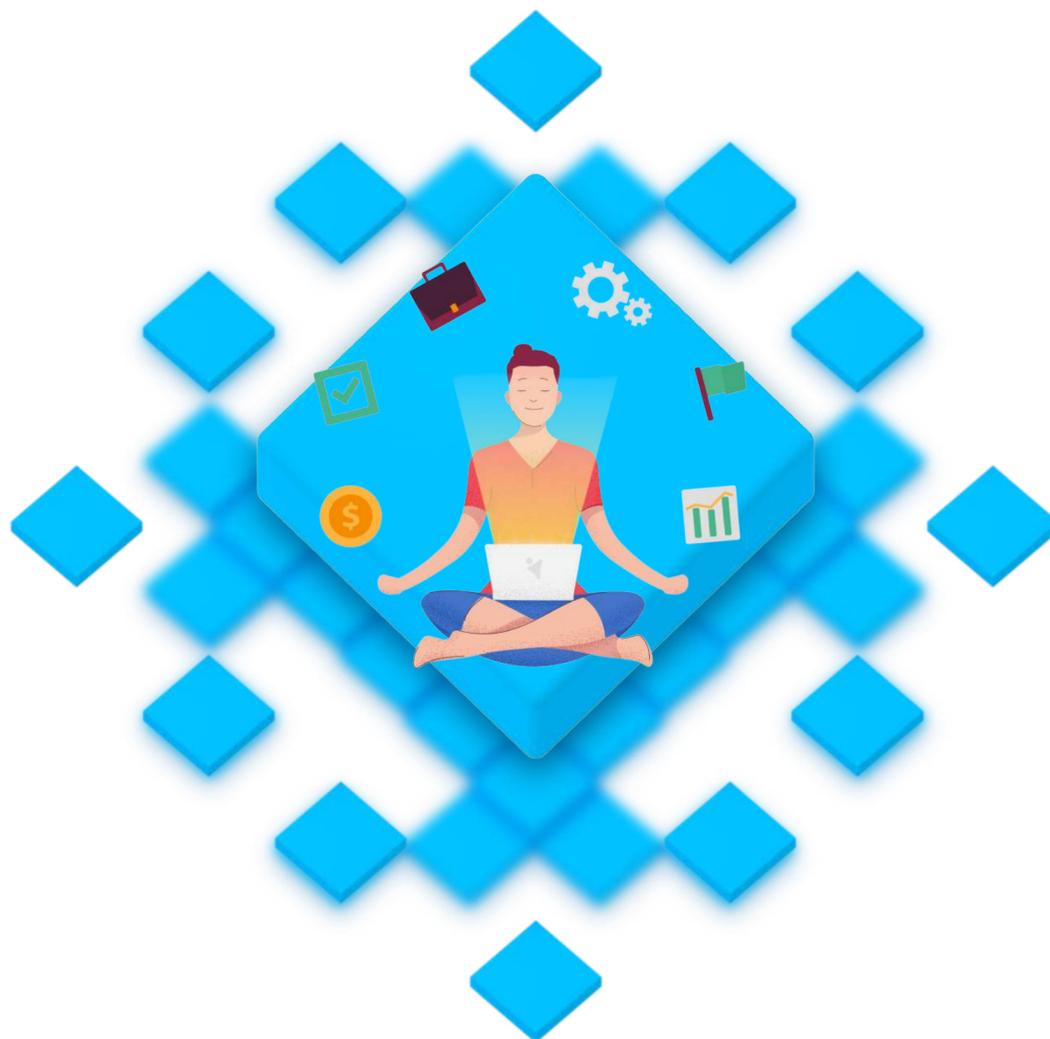
Deal record

Stage: New
Probability: 50%
Company: Dinosaur Hunt
Deal amount: \$2,000
Priority: Medium
Manager: Rachel Green
Email: dinosaurs4ever@gmail.com
Date: 6/5/2019
Client: Ross Gellar

Get final feedback from the team

Having tested several CRM systems, you can probably make up your mind on which of them you like more and which one suits your needs best. Now it's the time to get the final feedback from your team. Here you have two options:

- If you have tested CRMs with your team, you may conduct a survey or ask each of the team members directly which software they enjoyed using, which aspects they liked or didn't like, etc.
- If you didn't have a chance to try out the CRM systems with your co-workers, you may present them the outcomes of your research and share your ideas. This will help you make a wise decision.



Part 4.

Post Implementation

CRM adoption

Over [65% of businesses](#) integrate CRM software within their first five years. 18% of companies start using CRM in the first year after breaking into the market (and they're totally right!).

The process of CRM implementation doesn't end up with choosing the right system and integrating it into your workflow. It is also necessary to take care of its adoption by every employee.

To make sure that all your team members use the CRM on a constant basis, you may start with creating a guide and holding a couple of training sessions for the staff who will use the software. But don't try to do it all in one day: your team will definitely need some time to get used to the new system and adjust it to their needs. Be patient, give your employees some time, and get feedback from them regularly.

Measure ROI

The final step of CRM implementation is measuring the ROI. Again, you should wait a while to estimate the outcomes of the previous campaign and get unbiased results. This is why we recommended setting SMART goals at the beginning of the process. This will help you see how well the new CRM works for your team and adjust some of the processes or features if necessary. Some of the metrics that you can track include conversion rate, the number of closed deals over a particular period of time, and the average amount of time required to close a deal.



We are sure that you will make a balanced decision if you take your time and follow our guide. Good luck!

You may share your ideas and feedback to this guide to support@nethunt.com. We appreciate your help and support!

Appendices

Do's and Don'ts

Do:

- Consult your team at every stage of CRM implementation
- Take your time
- Consider your short-term and long-term goals
- Research all available sources of information
- Make a list of must-have features and integrations
- Test several systems
- Engage your colleagues into testing different CRMs
- Import sample data to each of the CRM systems you like
- Try out the customer support of the CRMs you like
- Identify the true cost of the CRM software
- Spend your time on full CRM adoption
- Create a guide for your employees on how to use a CRM
- Conduct training for the teams that will use new software
- Measure ROI before and after you implement the CRM
- Share the results of CRM implementation with your team

Don't:

- Rush
- Make a choice on your own
- Implement the first CRM system you like
- Put the price in the first place
- Neglect the reviews of other CRM users
- Expect to get the results right away

Checklist for CRM implementation

- Identify the global purpose of implementing a CRM system.
- Define the problems that you're facing in your business.
- Set SMART goals to check the results of CRM integration.
- Find out which departments have to/need to use a CRM.
- Get feedback from your team and identify their goals for using a CRM.
- Create a CRM team (optional).
- Plan the budget for both CRM software and its support.
- Create a list of must-have CRM features.
- Think through the integrations that you may need in your CRM.
- Think about your company's future and define the essential level of CRM scalability.
- Conduct research. filter out all the unsuitable CRMs.
- Test relevant CRM systems during a free trial, involve your team if possible.
- Look through the reviews of the suitable CRM software.
- Test customer support: demo, chats, emails, calls, etc.
- Identify the true cost of the CRM.
- Import sample data.
- Get final feedback from your team.
- Take care of CRM adoption
- Measure ROI