# 1CRM SALES GUIDE

## A Complete Guide to Selling 1CRM
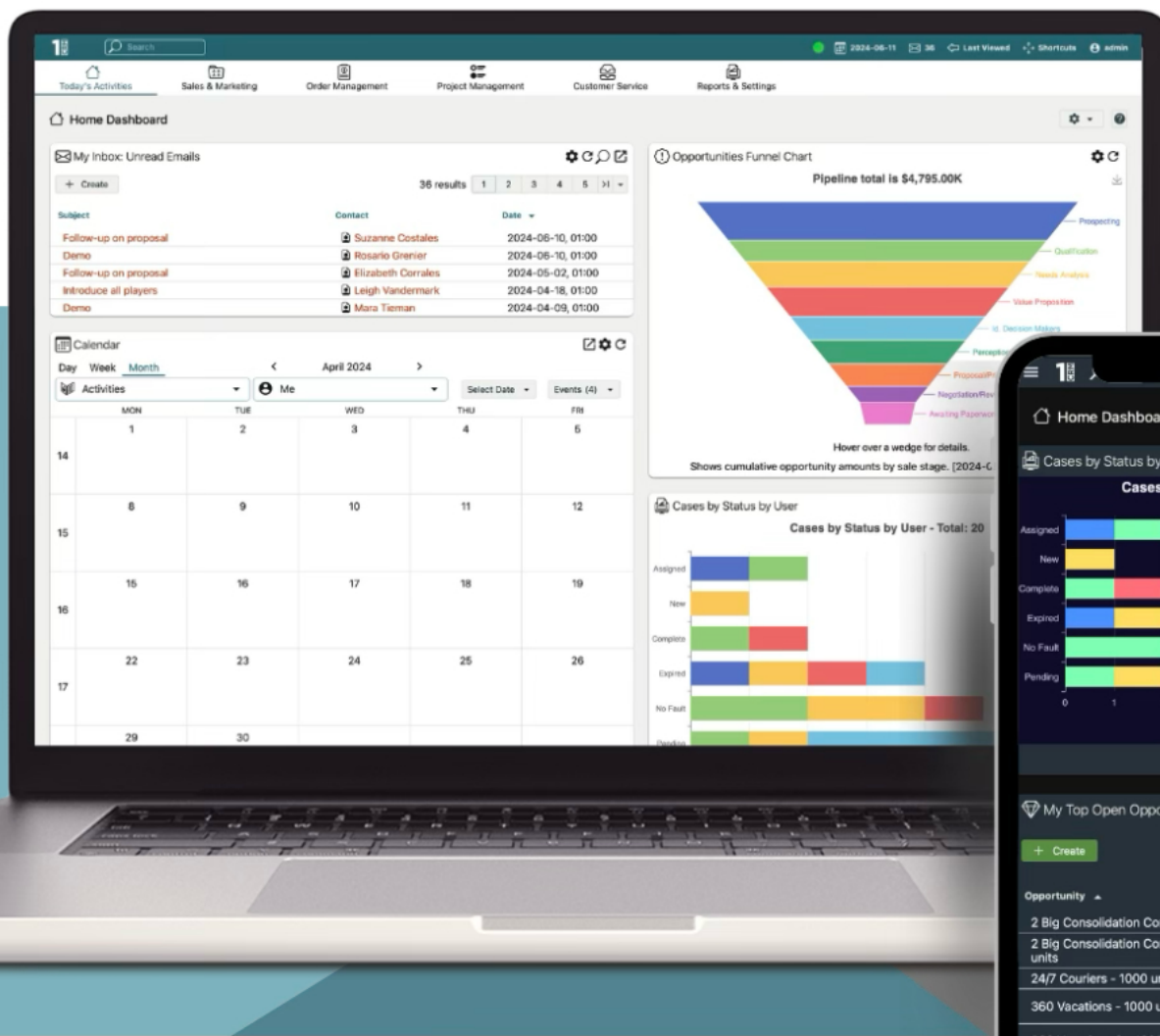
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## 1CRM CORPORATION: THE COMPANY

Founded: 1997

Ownership: Privately held Canadian company

Headquarters: Victoria, BC

Partners: Worldwide

# What Are We All About?

1CRM Corp. is dedicated to transforming each customer's business into an efficient, cost-effective, well-oiled machine. We firmly believe that the only way to do this is to enable each client to create a solution as unique as their business.

- One that they can <u>customize, bend, and adapt</u> to really fit their business.
- One that can **_grow and evolve_** with their business.
- One with <u>many integrations</u> to work with the products and services they love, and save them time each day. Telephony, Accounting, Online Store, Website forms, Google Apps, Outlook, Apple and Android .. everything works with 1CRM.
- One with <u>all the features</u> they require to run their business effectively, from sales and marketing to order management, customer service, project management and general management.
- Lastly, one with an <u>affordable price</u>. Customer relationship management is more important now than ever, so 1CRM is a product every business can afford and use to manage their business and their customer relationships.

# 1CRM: THE PRODUCT

*(Originally marketed under the name info@hand)*

## Available editions

Startup, Startup+, Professional, Enterprise

## Deployment options

On-Premise & Cloud Subscriptions (Monthly & Annual) On Premise Perpetual Licenses

## Operating systems

Windows, Mac, Linux

## Devices supported

PC, Mac, Smartphone (Android & iPhone), Tablet (Android & iPad)

## Languages supported

English, French, German, Italian, Spanish (open to adding more)

## Countries / Regions supported

Asia, Asia-Pacific, Australia/NZ, Latin America, Middle-East & Africa, North America, Western Europe, United Kingdom

## Intended users

Businesses with 1-200 employees, or divisions of larger firms

| Key Features | Description |
| --- | --- |
| MARKETING AUTOMATION | Generate lead forms for your website and affiliates. Convert those leads into customers by creating newsletters, drip-feed campaigns and dynamic target lists. Track your results with generated graphs. |
| ORDER MANAGEMENT | Create custom quotes & invoices to match your branding, set up recurring invoices and track bills & payments. 1CRM supports multiple layouts and tax rates, group & line item discounts, simple products or assemblies, quote approval workflow and more! |
| PROJECT MANAGEMENT | Manage and track projects throughout their lifecycle with 1CRM. Define project templates for common types of Projects, with lists of project tasks and assigned resources. Create and track booked hours, timesheets & expense reports within 1CRM. |
| MOBILE ACCESS | Access 1CRM from any Windows, Mac, iOS, Android or Windows Phone device. Compatible with Safari, Google Chrome, Microsoft Internet Explorer / Edge and Mozilla Firefox, 1CRM is available wherever you are. Sync Calendar Contact and Reminder data 2-way with the native apps on your phone, so they're available offline! |
| CASE MANAGEMENT | Manage and track cases throughout their lifecycle. Track client interaction, book hours and service parts to service cases, and print work orders. Generate invoices or debit to pre-paid blocks of service. |
| EMAIL | Compose and send emails in text or HTML format, and 1CRM will automatically connect them to the contact or account they relate to. |
| CALENDAR | Click and drag to create or re-schedule calls or meetings. Grid views show who is free for a group meeting, and the system can automatically send an email notification to selected participants. |
| CUSTOMIZATION | Choose from multiple languages, themes and colour schemes to personalize your 1CRM experience. Create custom dashboards, fields, workflows, layouts, views and modules to instantly access the data you need. Full WYSIWYG drag & drop PDF customization. |
| CONTACT MANAGEMENT | Manage all your contact, lead and account data from a single platform. Recorded contact details, emails, meeting notes can be searched easily, providing quick access to any interaction. |
| CUSTOMER PORTAL & ESTORE | 1CRM's free Joomla-based Self-Service Portal has forums, cases, bugs, projects, knowledge base, event registration, invoice/payment history, and an integrated eStore. It also has special partner access mode for viewing and creating leads & reviewing accounts. |

## Integrations

1CRM integrates with <u>30+ popular products & services</u> to provide users with a quick and efficient CRM experience. Integrations and customization are critical to closing CRM business. Familiarize yourselves with our current integration options, and keep track of new ones as they come out.

Want to create an integration but aren't sure how to customize 1CRM code yourself? Let us know, and we can introduce you to high quality inexpensive development partners who can support your efforts. Also note the new high-performance REST API coming in 2016 for Pro and Enterprise Edition, supporting the new iOS Mobile app and 3rd party integrations.

## 5 STEPS TO PARTNERSHIP SUCCESS

1. Become familiar with the partner portal

2. Develop and enhance your product expertise via the Training Centre and an in-house implementation

3. Promote your 1CRM partnership on your website and other avenues using current and relevant content

4. Define your business strategy and target client profile

5. Offer services to support clients with training, data migration, implementation, customization, and possible new integrations for 1CRM

# FACING THE COMPETITION

You'll be competing head to head with alternative CRM providers over price, features, and customization options. Here's how you'll win:

## Our Competitive Advantages

People who actually buy 1CRM do so for a short list of reasons:

- They like the 1CRM approach of a CRM extended to full business management.

- The best Order Management available that is integrated inside a CRM.

- Pricing seems reasonable to them - often 75% less than Salesforce for example.

- No user minimum. Can increase or decrease user count at any time.

- Can subscribe monthly or annually - and can change between them as desired.

- On Premise or Cloud Service, or even Perpetual License options.

- Advanced Customization: PDF Form Designer allows custom fields and custom cosmetic layouts in all generated PDFs; Module Designer allows full custom modules to be created without coding; Studio features allow layout customization for detail screens, list views and mobile views, plus a wide variety of custom fields.

- Integration with products and services important to them: QuickBooks, RingCentral, Xero, Magento, HubSpot, Outlook, WooCommerce, Skype, WordPress, GotoMeeting.

- Includes 2-way Sync with iOS and Android phones and tablets, that even allows offline access and editing of Calls, Meetings, Contact info, Reminders.

- Super flexible Calendar, including timesheet and project task tracking modes.

- Software source code is open - all users get all the source code, so they can hire anyone they want to customize it.

# Know the enemy

- *Zoho CRM*
- *SugarCRM*
- *Microsoft Dynamics CRM*
- *Salesforce.com*
- *WORKetc*
- *Infusionsoft*
- *Insightly*
- *Pipeliner*
- *Nutshell*
- *Pipedrive*
- *Hubspot*
- *Nimble*
- *AgileCRM*
- *Hatchbuck*
- *Base CRM*
- *vTiger*

**Zoho CRM:** *Looks low cost, but by the time you add up all the modules, it isn't. Poor integration between the modules often requires data to be entered multiple times, producing higher operating costs and lower data quality. Customization features are only simple and not very useful in the real world.*

**SugarCRM:** *Cheapest version more than our most expensive. 10 user minimum - so US$4,800 minimum per year.  Only annual subscriptions, not monthly. On  Premise may no longer be available. No perpetual license option. Feature set more like a conventional Sales CRM, not an All-in-One CRM for small business management like 1CRM.*

**MS Dynamics CRM:** *Price is $60-$103 / user. 5-user minimum. On Premise not really an option unless the client is perhaps 50 employees and a strong Microsoft multi-server environment on premise already. PDF Form Designer seen as a big plus by Dynamics clients that have moved to 1CRM.*

**Salesforce.com Sales Cloud:** *Price - by a lot! Also a narrowly defined Sales CRM - not an All-in-One CRM like 1CRM (which adds Project Management, Order Management, Service Management, Timesheets, Expense Reports, HR, etc..) 3rd party add-ons can address that but now the price gets even worse. Only Enterprise Edition ($125/user) or higher even offers workflow, and an external API for integration!*

**WorkEtc:** *Pricing - $49 (Team) or $59 (Foundations) per user to get more than 2 users. Still limited to 10,000 or 20,000 contacts even at those prices.*

**Infusionsoft:** *Pricing - typically $60 per user or more. 3-user minimum. Exclusively a Sales & Marketing CRM; it only covers basic Sales CRM with email marketing, plus eCommerce Store in its more expensive bundles.*

**Insightly:** *Pricing - $12-$99 per user for a simple Sales CRM with email campaigns. Severe limits on emails, records, and custom fields, to drive clients to higher versions. Basically a cheap, limited product for Sales organizations trying CRM for the first time.*

**Pipeliner:** *Pricing - $55 / user, only annual billing option. Pipeliner is a pure sales CRM, and a fairly thorough one. Based on a specific methodology that people either like or hate.*

**Nutshell:** *Pricing: $20 / user annually, $22 monthly. Strictly a simple sales CRM with integration to MailChimp for email marketing.*

**Pipedrive:** *Pricing: $12 / user monthly. Strictly a simple sales CRM.*

**Hubspot CRM:** *Free simple sales CRM. Exists to promote the HubSpot social marketing automation service which is extremely expensive.*

**Nimble:** *Pricing: $15 / user monthly. A sales CRM with an emphasis on email integration and tracking, activity tracking, and some social CRM capabilities.*

**AgileCRM:** *Pricing: $50 / monthly, $40 annual (Regular); $80 / monthly, $65 / annual (Enterprise). Sales / Marketing CRM with emphasis on Telephony integration in Enterprise. Includes simplified Trello-like project management, email campaigns, but no Order Management or Service Management. Access Control is Enterprise Only!*

**Hatchbuck:** *Pricing: $179 for 5 users / monthly paid semi-annually (Small Biz); $269 for 10 users / monthly paid semi-annually (Team); $449 for unlimited users / monthly paid semi-annually (Professional). Sales / Marketing CRM. Limits on number of Contacts.*

**Base CRM:** *Pricing: $75 or $125 / month for more than 5 users, small entry level  is $25. Sales & Marketing CRM with integrated telephony, call recording. No order, service or project management.*

**vTiger:** *Pricing: $24 / monthly or $20 annual (Sales Pro); $36 / monthly or $30 annual (Ultimate). Only Ultimate includes project, service & inventory management.*

# Seek out their vulnerabilities

## *Cost effectiveness*

1CRM includes more features for a lower price than most CRM solutions on the market. Monthly, annual, and perpetual licenses are available to suit the unique needs of more customers.

## *User minimums*

Businesses can begin using 1CRM with as little as 1 user, while some competitors have minimums of 5-10. Large minimums exclude potential customers who need to test a CRM before enrolling their full workforce.

## *Missing features*

Many "CRM solutions" are missing key features that businesses rely upon. They might only offer core sales CRM (Nutshell, Nimble, Pipeliner, PipeDrive) or sales CRM plus marketing automation (Insightly, Infusionsoft), but market themselves as a full CRM.

This forces users to seek out other programs to use in addition to their "CRM", while eating up their time and money. And means integrations are needed as well.

1CRM goes above and beyond by including full order management & project management, in addition to standard CRM features; such as, sales & marketing automation, case management, email and calendar integration.

## *Difficult to customize*

With 1CRM, users can easily create custom dashboards, list views, detail screen layouts, fields - even whole new modules and PDFs to suit the ever-changing needs of their business. Unlike many CRM vendors, 1CRM also provides users with the source code. This allows users to add more extensive customizations, without having to pay for expensive customization services from a restricted set of suppliers.

## *Head in the clouds*

While Cloud CRM is increasing in popularity, there are still many clients who prefer to keep data strictly on their own servers. Many CRM companies no longer offer this option, providing you with the opportunity to sell 1CRM! Available as a Cloud service **or** On-Premise software, 1CRM meets the needs of both types of clients.

Regardless of deployment option, you can also export your data from 1CRM at anytime via CSV - your data will never be held hostage!

## Strategically use this information

Knowing what differentiates 1CRM is the CRM marketplace is an essential tool for objection handling and closing sales. You will be able to better identify areas in which potential clients are struggling with their current CRM, or where there is room for improvement by using 1CRM. Knowing the facts can also help you win over customers who have reservations about using a CRM system at all.

**Note:** *The information contained in this document represents the current views of 1CRM as of the date of the publication. This data is for information only. 1CRM makes no warranties, expressed or implied, in this document.*

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# YOUR SELLING OPPORTUNITY

Now that you're armed with facts about 1CRM, it's time to seek out some sales opportunities. These questions can help determine if your client is dissatisfied with their current CRM or business software, as it applies to some or all areas of their business.

| Opportunity | Questions |
|---|---|
| **COST EFFECTIVENESS** | Are you currently paying for more users than you require?<br>Does your CRM or business software occupy a large portion of your budget? |
| **INCLUDED FEATURES** | Does your current software include all the basic tools you need to run your business; such as, order & project management?<br>Have employees asked to add additional software to the system? |
| **FUNCTIONALITY** | Can requests from partners or customers be fulfilled reasonably quickly?<br>Does the software inhibit users from completing tasks?<br>Is the level of user complaints rising? |
| **CUSTOMIZATIONS** | Do you have access to the software's source code?<br>Can you easily create new fields, modules, and layouts to suit the needs of your business? |
| **INTEGRATIONS/MOBILE CRM** | Do you have multiple non-integrated information stores?<br>Can you access and modify your data using any mobile device?<br>Can you create custom mobile screen layouts for an optimized experience? |
| **SALES & MARKETING** | Do your marketers have easy access to sales & marketing data, including planned campaigns and historical results?<br>Can you view your data trends over time for a detailed view of your ROI? |

> *"A very robust application and certainly more feature rich than the basic SugarCRM."*
> *- Paul Greenberg*

# RESOURCES

## Pricing
https://www.1crm.com/editings-and-pricing

## 1CRM product brochures
Core Product Brochure

Editions & Pricing Brochure

QuickStart Services Brochure

## Partner products & integrations
https://www.1crm.com/partner-products/

## CRM training centre
https://www.1crm.com/crm-training-centre/

## Documentation
http://www.1crm.com/documentation/

## 1CRM customer forums
http://www.1crm.com/forum/

## Live demo of CRM and self-service portal
https://www.1crm.com/live-demo/

## Social media presence