

CRM Checklist for Success

What types of pain points or problems are you trying to solve?

- Information is spread out through multiple software platforms.
- Current solutions are too expensive.
- No complete view of contact and info.
- We want to integrate our CRM with all of our different systems.
- My sales team won't adopt the CRM.

Customer Service Features:

- Service contract storage.
- Linking of service contracts to accounts.
- Bug tracking.
- Automatic bug creation from cases.
- Automatic bug creation from emails.
- End-to-end case management.
- Track resources & billable hours specific to cases & work orders.
- Automatically create articles from service cases.

Marketing Automation Features:

- Automated lead capture from your website.
- Automated email followups & workflow.
- Mass emailing.
- Create nurture/drip email campaigns.
- Capture leads & automatically assign to salesperson or target lists.
- Campaign activity & reporting

Do you Need to Customize or Integrate Your CRM?

- API and development support.
- Custom reporting and views.
- Customizable dashboards.
- Custom templates and document library.
- Currency and multi language support.
- Microsoft Outlook Integration.
- GoToMeeting Integration.
- Google Apps Integration.
- DropBox Integration.
- QuickBooks Integration.
- Content Management System Integration.
- Riva Integration.
- Magento eCommerce.

Contact and Sales Management Features:

- Capture multiple contacts & information for each organization.
- Centralized system to manage entire sales & contact database.
- 360 degree view of customer.
- View detailed contact & lead histories with all sales activities.
- Sort, filter & group data & create custom reports.
- Segment & manage all lead & contact lists.
- Sales forecasting with opportunities & pipeline management.
- Assign contacts & leads to sales representatives.
- Prioritize opportunities & leads.
- Drag & drop calendar for calls & meetings.
- Sync data across all mobile devices.

Social Media Features:

- Ability to link contacts to social media profiles.
- Follow organizations social media profiles.
- Interact with leads & customers on social media.

Project Management Features:

- Project tracking with gantt charts & multiple views.
- Project tracking with task lists.
- Assignment of projects to specific user or role.
- Resource and value of projects.
- Expected revenue of projects.
- Employee expense reports for specific projects.
- Integrated timesheet & timesheet management.
- Project templates for common types of projects.
- Shared calendars for scheduling & resource allocation.
- Calendar integration with iCal & Google Calendar.

Do you Need to Customize or Integrate Your CRM?

- Low training time.
- Online Knowledgebase & documentation.
- Online Help Forum.
- Data Import.
- Cloud Service.
- On premise Service.
- High Rate of User Adoption.
- Free Trial (no credit card required).
- All features included in costs (no hidden fees).
- Affordable.
- Video tutorials.