

THE 2024 CRM COMPANION

Essays about the top applications and implementation advice

By Gene Marks, CRM Forbes Columnist



Targeting the right customers



Increasing interactions



Getting more value from marketing



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Columnist Gene Marks

About the Author

Since 1994 Gene Marks CPA has owned and operated [The Marks Group PC](#), a 10-person consulting firm that specializes in customer relationship management (CRM) implementations. The Marks Group implements more than a dozen CRMs and specializes in Zoho, Microsoft Dynamics 365, Salesforce and Hubspot. The company, which is based near Philadelphia, currently serves more than 600 mostly small and medium sized organizations across the U.S.

The Marks Group provides implementation, training, consulting, customization and development services to the clients using the CRM systems it provides. The company also helps clients select CRM systems.

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Gene is the author of six bestselling books, most recently *Want More Cash: 100+ Ideas And Strategies For Increasing Your Company's Cash Flow This Year*. Gene speaks 50+ times per year to industry and business organizations on issues impacting their companies. He also frequently appears on national TV and radio outlets.

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INTRODUCTION

Get a CRM System

I'm embarrassed to admit this: last December my wife and I received a fruit basket from our local Japanese restaurant. That's right, a fruit basket. Have you ever received a holiday gift from your local Japanese restaurant? Any local restaurant? Yeah, I thought not.

As you've probably figured out by now, we're big customers. We get takeout from this restaurant every Friday. For about 15 years. We sit in front of the TV, eat our sushi, drink a glass (or five) of wine and relax. The Japanese restaurant knows this. They appreciate us. They realize that we're great customers. And they are experts at CRM.

A Japanese restaurant? Experts at Customer Relationship Management? You bet they are. They use an inexpensive program called ACT!. I'm sure you've heard of it – it's been around for years. There are other great CRM applications out there to choose from too from Salesforce.com to Microsoft Dynamics to Zoho, Insightly, GoldMine and SugarCRM. The key is that you get one. Any one. They're all good. They're all mature. And then you use it. Because you need one. Every business needs a CRM system, no matter how small, no matter what you do. Why? For 3 reasons.

Nothing ever falls through the cracks. Whenever a customer comes in your store or business you've put them in your CRM database. You can ask them a few questions about what they like and don't like. You can track the things they buy (or would like to buy). When a customer calls you can log what you talked about. You can set reminders to follow-up with customers on quotes, specials or other deals. You can segment your database to quickly send out emails to groups of customers depending on their interests and past purchases. That's why I'm getting fruit baskets at Christmas, special offers each month and a birthday card every February....from my Japanese restaurant! The goal is to keep your customers coming back by being proactive, by reaching out, by thinking of them before they think of you. A CRM system will help you do that.

No one looks like a dope. When I call my Japanese restaurant every Friday they know who I am before they pick up the phones (their CRM system is integrated with their phone system, a very easy thing nowadays, so that my record pops up when the call is received). And they know what I always order. That way I can just say "same as last week" and the order is done. I love those guys, but sometimes the language barrier can be tough! They know me. I get the feeling of being recognized, being appreciated. Don't you wish some larger companies would do the same? The restaurant has notes in their system about me. Sometimes they even make suggestions for new items to order based on what I ordered in the past (there are various kinds of ways to prepare shrimp, don't you know). There are half a dozen sushi places within a five mile

radius of my house. This is how my Japanese restaurant stands out. They use their CRM system to make relationships.

They build value. With the right culture and discipline, a company's CRM database can be a very, very valuable intangible asset. Say the owners of my Japanese restaurant want to (gasp, no!) sell to someone. Along with the equipment and lease would also come a great database of customers! People who have eaten there before, what they've eaten, how often they come, who they're related to. What a great way to be off and running for the new owners. A good CRM database can be an important part of any business transaction and will result in a higher price if you ever do want to exit from the business someday.

So yes, that's what we do on Fridays. We don't socialize. We don't go out with friends. We sit and watch Jimmy Fallon and drink wine and eat our sushi. Now you know. Of course, our Japanese restaurant has known that for years. It's in their CRM system. Wonder what we're getting from them for Christmas this year?

CHOOSING A CRM

1 in 4 Small Business Replaced Their CRMs in 2022 and These Are The Lessons Learned

A [new survey](#) of 300 marketing executives conducted by Third Door Media - the publishers of marketing and SEO research and news platforms [MarTech](#) and [Search Engine Land](#) - revealed something that may not surprise you: many businesses still aren't satisfied with their customer relationship management systems.

The survey found that almost one out of every four (26 percent) small businesses (companies with less than \$25 million in sales) replaced their customer relationship management systems last year. Large companies replaced their CRMs at about the same level. Mid-sized companies (those with revenues between \$25 million and \$500) a little less - about 17 percent.

To me, this is a big number. One in four? Why is this happening? Why do so many businesses feel the need to go to the time, expense and effort to rip out their existing CRM systems for something better? There were two primary reasons, according to the survey: better features and more integration. And there are some lessons to be learned.

Many companies are still using homegrown CRMs, created by internal developers on custom databases. In the MarTech survey 43 percent of respondents who replaced a homegrown application cited better features as the impetus with 14 percent of those replacing homegrown tools said the platforms were too expensive to maintain. So here's the first lesson.

Lesson #1: homegrown systems are becoming less and less cost effective for CRM.

That's not surprising to me. When I speak to companies who are considering building their own internal CRM systems, the vast majority ultimately choose to purchase a commercial solution and customize it. Re-creating the wheel just doesn't make sense, particularly when there are so many affordable CRMs that provide out of the box tools with low-code/no-code functionality to build and integrate apps around them. For those that have homegrown CRMs, that realization also becomes apparent as they become more familiar with the vast number of features and tools provided by commercial systems. Bottom line: home grown apps rarely make sense anymore.

But that doesn't mean commercial apps are perfect. Many commercial apps don't do a great job integrating with other platforms. That's why 24 percent of the marketers that replaced their commercial CRM applications last year did so in favor of better and easier integration. Which brings me to:

Lesson #2: integration is becoming more important for CRMs.

Most of my clients desire their CRM systems to talk to their financial, projects and e-commerce systems. They want to see order history, open transactions, and the types of products and services being provided and purchased real time. For my clients - which are mostly small and mid-sized companies - integration with these platforms is never a short-term goal, but always a long-term priority. Which is why making sure you're choosing the CRM that either integrates with these systems out of the box or provides the tools to do so is critical in the evaluation process. Also

make sure you have the human resources (external or internal) to do the work when it's time. Integration options are better than ever. But doing the work still isn't easy and takes time.

Finally, and interestingly, the majority of the people (53 percent) surveyed by MarTech who said they replaced their commercial apps said they did so due to the "need for better features." Here, I'm going to argue.

I often come across companies looking to replace their CRMs for the same reason. But when I start digging, I frequently find that "better features" is just an excuse for poor implementation. Today's mainstream, commercial CRM applications have the features most companies need. And because they're in the cloud and watched closely by each other, new features are often emulated. Unless a CRM system is very old, or on-premise, I've found that the "lack of features" excuse is often due to lack of knowledge about the product. So...

Lesson #3: before you blame "lack of features" when replacing your existing your CRM, get some expert advice.

Talk to the vendor or a partner. Go to their conference. Pay for some consulting and training. Spend some time on YouTube. Read. I bet you'll find that the "lack of features" is really due to your lack of understanding and can be addressed via customization or training at a price much, much less than replacing the entire system. It will certainly be less disruptive.

There's a lot of good stuff in the MarTech survey and I may revisit it soon. But in the meantime, consider these lessons before you undertake a replacement of your current CRM system.

What's The Best CRM Software for Apple's Mac?

I ran across a [research report](#) recently that provides data on the "Mac CRM Software Market." It got my attention. Why?

Because back in the day, when there was no cloud, this was a thing. Companies had to buy Customer Relationship Management and accounting software specifically designed for either the Windows or iOS operating systems. Because the Apple offerings were so limited in comparison to Microsoft, some of our clients purchased Windows emulation software to trick their Mac computers into thinking they were running Windows and could therefore run Windows-based CRM applications. As you can imagine, the results were oftentimes disappointing.

But that's no more. That's because today most CRM applications are cloud based. There's very little stored or installed locally. So as long as your CRM is compatible with the major browsers then you can easily run them on any device, regardless of the operating system. More good news: most of the major browsers - Chrome, Edge and of course Safari - are compatible on many Mac devices too. The bottom line is that you really don't need to look for an "Apple-specific" CRM application for your business anymore. This isn't 1992, or even 2002.

So why would a research company spend the time to do a report on "Mac CRM Software"?

The report I read is published by a company called [Global Market Vision](#), which, according to its website, is "an India based market research and consulting company" that provides "most insightful as well as comprehensive quantitative and qualitative analysis of in-depth market research required for SME's and large enterprises." Actually, I'm not being fully transparent here. I didn't read the entire report. I only read the company's press release, which summarized some of the report's findings. That's because I wasn't willing to either forfeit my email address to get a "sample" or fork over \$3,500 for a single user version of the report. I don't regret that decision.

What also raised my antenna was that the company's press release advertising their research specifically said it covered applications like [HubSpot](#), [Pipedrive](#), [daPulse](#) (now part of Monday.com), [Zoho CRM](#), [Platformax](#), [IXACT Contact Solutions](#), [NCH Software](#), [Marketcircle's Daylite](#), [iEnterprise](#) and [Azor](#). You've heard of some of these, I'm sure. Some of the others - like Azor and Platformax - are based overseas and are unfamiliar to me. Just about all of them are really not Mac-specific. They run in the cloud and can be accessed by most devices. I found that some of these sites - like Azor - weren't so much about providing a Mac-based CRM but rather just seeded the words "Apple" and "Mac" throughout for the obvious SEO benefits.

One application did stand out among the crowd: Daylite software, which is made by Marketcircle. The makers of this application are going all-in with Apple. They say that their software is "made for Mac, iPhone & iPad" and "works seamlessly with many of the built-in Apple apps and features you already know and love" like Apple Mail, Apple Calendar, Siri, Face Time, Pages, Numbers and Keynote. Of course, the application also integrates with many other popular apps, including Microsoft's offerings. If I was a hardcore Apple user I'd check out

Daylite because, well, why not? But I'd be careful. Is the company going to be around for the long haul? Is there a large user community? Is there a good support infrastructure? And, most importantly, how does Daylite's integrations compare with other popular and more CRM applications which also integrate with Apple applications?

When you search around you don't find a lot of CRMs that specifically say they're designed for the Apple Mac. Apple doesn't make one. And when you look at all the comparison sites they usually include all the familiar names. That's because it's tough to build a business around a product that is very, very niche, especially when there are so many larger competitors who - thanks to the cloud - have these bases covered.

The bottom line is that if you're a Mac user don't worry about buying a Mac-based CRM. Focus on buying the best CRM that fits your company's needs. I'm going to bet that it'll run fine on your Apple devices.

Do You Really Need A CRM Consultant? Really?

Do you need an outside consultant to help you implement a CRM system for your business? The answer is: it depends.

My company implements CRM systems. We specialize in five of them. We are very knowledgeable about them. We know how to configure users and security. We know how to customize their screens, views and fields. We can write reports, scripts and small apps around them. We can integrate your CRM system with other systems or just setup integration that's already available from others. We migrate data. We train people. We setup AI tools, workflow rules, alerts, triggers and automation schedules.

But here's the thing: you don't need us. You really don't. Why? Because none of this is that hard.

We're good, but what we do isn't brain surgery. We're not building the space shuttle. We're not curing cancer. Pretty much everything that we do can be self-taught. If you want to learn how to do these things with your CRM system and your application is provided by a good vendor then I'm sure there are countless opportunities to attend trainings, go to conferences, watch videos or read technical materials.

So why hire a CRM consultant? For two reasons.

The first reason is to simply save time. I could mow my lawn but instead I have a landscaper do it. I could upgrade my bathroom but I choose to have a contractor do that. I could do my own taxes but I have an accountant for that. These people are specialists in what they do. I do what I do and they do what they do. I would rather do other things with my time, be it working, reading or riding my bike. I would rather pay someone to do these tasks so I can do other things that I enjoy, or that I'm better at.

The same goes for a CRM consultant. Sure, you can do your company's CRM implementation. But you probably won't do it as well as someone who specializes in doing these things. I would make a mess of my yard, screw up my bathroom and be in trouble with the IRS if I did these things myself. I'd rather let the experts do these things (with my supervision, of course).

The other reason is to minimize problems. A CRM consultant works with CRM systems all the time. When you get someone who specializes in your product they will know the ins and the outs, the good, the bad and the ugly. They will know the minefields to avoid and the best features to deploy. They'll use their experience with their other CRM clients to advise you on the best way to setup your CRM system.

Even if you choose to limit your use of a CRM consultant and do some of the things on your own, you're still best advised to have them recommend the best ways to set things up, the fields to use, the views to configure and the access to allow. This way you'll be pointed in the right direction and you won't go down a road that will cause you problems in the future.

It's your choice. My advice though is to use a CRM consultant at least for the second reason so you don't paint yourself into a corner.

Regardless of what you do, here's the most important thing; have an internal owner of the system. Some call this person an administrator or a power-user or whatever. But that's the person who's ultimately responsible for the completeness and accuracy of the data in what is, in the end, just a database.

That person should be tasked with getting your system configured and used. They will need to train your staff and be available to answer any questions. Depending on the skill level of that person - it could be a simple administrative employee or someone more technical - you'll want to make sure that person is given the resources to do their job effectively. That could mean paying for training materials, seminars and conferences. Or it could mean paying for a CRM consultant to advise that person and be available to answer any questions along the way.

So do you need a CRM consultant when you implement a CRM system?

Again, that depends. But I would say probably yes even if you use that firm in a very limited capacity because you've got a good administrator/power-user internally. CRM consultants aren't cheap (I'll write about that in the future) but they can provide a significant value for making sure your CRM system is used the right way and increases your company's productivity and ultimately...profitability.

"User Friendly" And This One Other Thing Are The Two Most Important Requirements For A Small Business CRM

A [press release](#) from a CRM company called [Evergent](#) caught my eye this week.

The company announced the release of a new customer relationship management (CRM) product specifically targeted at streaming and digital subscription businesses who use Amazon Web Services (AWS) as their cloud platform and its listing on the AWS marketplace, a place where thousands of app developers are also selling their solutions.

Evergent's product - called CCB 3.0 - looks promising and I wish them every success. But what really caught my eye was their headline which promised that its solutions are "user friendly." I hope so. Because if you're looking for a CRM and particularly for a small or mid-sized business that doesn't need very advanced or complex requirements, being "user friendly" is important, albeit somewhat difficult to achieve.

That's because "user friendly" is a very, very gray area. I can easily name twenty of my clients who think that one of the products we sell – Zoho - is extremely user friendly and then immediately offer another twenty that say it's very much not user friendly. User friendly depends on personalities, habits, left brain, right brain and other impossible-to-quantify factors. You tell me the color of the living room is blue. Your spouse says it's aqua. Given all the subjectiveness, it's problematic to get everyone in a team to agree on whether or not a CRM application is user friendly. But it's important to at least get a significant majority to agree.

My advice: choose a CRM that's most like your existing applications. That's because people don't like change. So if they come across a CRM application that looks and feels familiar they'll say it's user friendly, even if it's no more friendly than anything else. Which means that if your company uses Office 365 or Google or a specific ERP/accounting software a lot then finding a CRM that's most like it will be your best bet.

This is important because - in reality - most mainstream and successful CRM applications geared to small and mid-sized businesses have the features you need. They watch each other closely. They easily publish updates overnight to their cloud-based systems. They match the competition line-by-line on the typical "CRM Comparison" checklist that people seem to like to do. You're not going to find one that's so overwhelmingly better than another in this category.

That's why user friendliness is so critical. That...and one other thing.

It's how the system is delivered. Because even though these small business CRM applications have the necessary ingredients to be a very productive tool, they need to be set up the right way. Because if they're not, then all the "user friendly" in the world won't help you.

So just as important as being user friendly you need to find a person – the internal team at the CRM vendor or an outside partner or consultant - to set up your system properly. That means configuring the fields, designing the reports, migrating the data, creating automation, integrating with other applications. And then there's training, training, training, training, training...of both

users and administrators to carry the ball. All of this needs to be done by people that you like and trust and give you confidence.

No offense, but when it comes to setting up your CRM system, there's a high probability that you don't know what you're doing. You don't implement CRM systems for a living. You're in sales, marketing or service. You know your company and your products. And you also know what you want when the smoke clears. So you'll want to communicate those objectives to an experienced person or firm that does this all the time with the product you've selected. They'll get you off on the right foot and, if you're willing to keep investing, they'll continue to make sure that you don't go off-track.

So yes, user friendly is very critical. But so is who's implementing your system. If you're a small or mid-sized business that's chosen a popular CRM application then focus on those two things and you'll have a very significant chance of success with your new system.

What Are The Most Popular Add-Ons For CRM Applications?

My company sells and implements five CRM applications and we've been doing this for too long to mention here without depressing myself. We've implemented CRM systems at hundreds of businesses. Many of those also take advantage of the add-ons that their CRM vendor provides, usually through a marketplace or app store. Since most CRM systems moved to the cloud during the past ten years there's been a proliferation of add-on applications to fill the gaps in the features not provided. I didn't do this scientifically but I can easily list out the most popular types of add-ons that my clients typically use. Here are, anecdotally, the top five in no particular order.

1 - E-Mail Marketing

You don't want to use your CRM system for e-mail marketing. Sure, if you want to send out a few dozen or maybe even a hundred emails at a time you can do that without suffering the wrath of your internet service provider. But any more than that and you're looking for trouble. That's why there are so many e-mail marketing platforms available to day like MailChimp and Constant Contact. The good ones perform due diligence to ensure you're not sending out spam and then offer templates, metrics and other features to maximize your marketing campaigns. E-mail marketing platforms will integrate with most mainstream CRM applications and synchronize lists, responses and analytics. I wrote above that this list was in no particular order but I lied a little. E-mail marketing platforms are definitely the top add-on for my CRM clients.

2 - Text Messaging

There's good news and bad news here. On the good side, there are some pretty reliable text messaging add on applications for most CRMs like Twilio, Simpletesting and SMS Magic. Also good is that they will send out mass texts to your - and I say this with gravity - "OPT IN" list of people that choose to receive your texts. The bad news is, after extensive research, I have yet to find a text messaging add-on that will not only send mass texts but synchronize texts from my personal mobile device, be it Android or iPhone. There are FCC rules in the U.S. that prohibit a lot of what these applications can do. A workaround is to have a separate device/phone number for individual texts, but this isn't helpful to me. Regardless, these applications as add-ons to CRMs have grown in popularity.

3 - Web Integration

Many of the popular CRMs offer tools to integrate your website with your database. However, go-to recommended add-on is JotForm. It's super easy to setup and just as easy to integrate with most major CRM platforms. Plus it comes with its own workflow and other automation that can provide updates, responses and alerts even before the data hits your CRM system. Not enough of my clients integrate their CRMs with their websites and they should. Whenever someone visits, requests information or has an online question you want that interaction and any available contact details to come into your CRM database for followup and further engagement.

4 - Phone Integration

Many of my clients ask me to recommend a phone integration application for their CRM system. By integration they really just want a few things. First is a popup of a contact record for who's calling before the call is picked up. Next is the ability to record and transcribe the conversation automatically into that record and then finally save it into history with perhaps workflow reminders for followups. There are some stand-alone phone integration apps but my advice is always to talk to the provider of your phone system. Whether its Grasshopper, RingCentral or VirtualPBX - which are all popular cloud based communication systems for small and midsized businesses - you'll likely find that there are apps that the communications platform provides that will plug into your CRM. Start there.

5 - Database Integration

If you want your CRM system to talk to another database then your best bet is to check out either Zapier or Workato. Both platforms have literally thousands of connectors between just about every popular CRM platform and other business systems, from accounting to social media to ecommerce to payments. As powerful as these tools and templates are you'll still want to hire some one expert in configuring them and both vendors can provide names of independent consultants, or you can find someone on LinkedIn. I also like these applications because they're supported by the vendors and are updated as other systems are updated. Don't develop these integrations on your own. It's not worth it.

If you go on to your CRM vendor's website you'll find the marketplace or app-store or whatever they call it where they have loads of third party add-ons. Be careful what you choose. You want something developed by someone who's still going to be in business next week if you have a question. Use an expert. Test out the alternatives. Then do something on a limited scale just to make sure everything doing what you want it to do because sometimes - gasp - these vendors exaggerate the capabilities of their software solutions. However, if and when you find the right add-on it could really make your CRM system way more productive than it was before.

Use These Three Sales Technologies

When you run a business it's important to make the right investments in technology. Some technologies you absolutely must have to do your accounting, take orders or issue payroll. But there are other types of software that you can purchase which will help you increase your sales...and cash flow. Try these three.

CRM

CRM stands for customer relationship management. A CRM system is essential for any sales organization nowadays. It's really just a database and most commonly cloud based. Your CRM system would have in it every person and company that your company does business with. A CRM system, when setup the right way, would integrate with your email, calendar and contact management system.

A CRM system will track your company's sales opportunities, forecasts, quotes and open tasks. It will help you manage your marketing campaigns and service issues. With a CRM system you will make sure that every customer is properly managed and every prospect is on your radar. That way you can increase your sales not only by following up on all prospects but making sure your customers being properly serviced.

E-Mail Marketing

One thing's for sure: email is certainly not dead. In fact, despite the rise of social media, texting and other forms of communication, email still remains the most popular form of communication in the business world. Most emails systems today handle the day-to-day communications necessary to conduct business. But to increase your sales you need more. You need an email system that can send handle your email marketing campaigns.

With a good email marketing software, you'll be able to send out emails to thousands of recipients who have opted-in to hear from you. The services and software will provide for you templates to design your emails. They oftentimes integrate with CRM systems so you can launch campaigns from there too. E-mail marketing services can track your emails and provide metrics as to who viewed, opened and clicked on items in your messages. When you use a good e-mail marketing service, you're assured that your emails will be delivered to your recipients - as long as you comply with their rules and make sure your emails meet their specifications.

Quoting

It's essential for every sales organization to have a quick way to get out quotes and proposals to their prospects and customers. Many accounting and finance applications provide these capabilities. So do good CRMs. Even if you don't have those features available in your existing

business systems you should consider getting a good quoting software as an essential tool for your sales people.

A quoting application must be customizable so that your people can create quotes that are specifically designed for your business. It should be able to be accessed from any device and over the cloud. It should be integrated with your order and inventory management system so that sales people are pulling information from the same database. Also, and most importantly, a good quoting system must come with alerts, reminders and workflow to ensure that quotes are meeting the requirements of customers and that no quote gets missed, forgotten or routed to the wrong person. Sometimes a simple word processing or spreadsheet application can do the trick, particularly if you're a very small business. But it's essential to have some form of shared quoting system if you want to increase your sales.

All of these technologies - CRM, E-Mail Marketing and Quoting - are available from many vendors just by searching for them online. You'll also find their prices appealing – many cost just hundreds of dollars a year depending on your group size. Make sure you test their demo versions and I recommend working with a partner who's an expert with the application to ensure that they get setup the right way. When that happens, you'll see how these great technologies can have a significant impact on your sales...and cash flow.

What if You Don't Want a Cloud Based CRM?

What if you don't want a cloud based CRM application? What if you just want to buy and install the software in your office? Believe it or not, I regularly run into businesses that ask me these questions. It's not that they're averse to the cloud. But they have reasons why they would prefer to keep things in house.

For example, we have one client with offices around the world and a strong internal information technology team that has built a fast network and who claims that their applications running on their intranet are actually faster than the ones hosted by outsiders. I have another client who has created a very customized order processing system and wants something in-house to integrate with it. There are some smaller companies that have perfectly good servers and networks and prefer using those.

Then there are others who argue that their data is more secure in-house than hosted externally. Some of those clients - large healthcare or financial services firms - may have a point. Besides, they're subject to such regulatory oversight that exposing their data to the outside world creates unnecessary risks. However, I believe that most of my smaller clients would be better off security-wise if they relied on a cloud company for their security than their own IT person. But let's leave that argument for another time.

There's also cost. Cloud CRM applications will likely cost more over the long run because you're paying a monthly fee for all users as opposed to just a one-time fee to buy the software. Some of my clients also worry that they also lose control of the cost because their cloud provider can raise those monthly fees whenever they want and it's difficult to move away from a platform where much has already been invested.

If for any of these reasons you're considering an on-premise application, you do have a few solid choices. What are the best ones?

My firm sells [GoldMine Software](#). We have hundreds of clients - mostly small businesses - who use it. It's a strong contact manager that's been around for decades. Swiftpage sells an on-premise version of [ACT! software](#) which I believe is very comparable to GoldMine. [Maximizer Software](#) has an on-premise version of its popular CRM software. Even Microsoft makes a server version of [Dynamics](#) available for those who want it. There are other on-premise options available - check out the excellent software comparison site [Capterra](#) to do more research. With the exception of Microsoft, all of these applications share similar benefits.

They all offer both cloud and mobile options. They can be purchased for a one-time fee and installed on your server. Some - like GoldMine - only charge for users signed-on to the system

at the same time instead of requiring that everyone has a license, so the investment can be much less. They integrate with desktop products like Microsoft Office. They come with developer tools for integration to other applications. They are stable and if used on an internal network may be faster than a cloud based solution. They can be downloaded to laptops and used offline. They could (arguably) be more secure. Most importantly for some of my clients - particularly those in rural areas or heavy travelers - you don't need the Internet to use them.

Of course, there are drawbacks. GoldMine, ACT! and Maximizer are older players that are likely more well-known to the over-50 set than millennials. They have dwindling user bases, support infrastructure, partner networks and older architecture. The companies that make and support these applications are oftentimes at odds as to where to devote their resources between evolving their on-premise and cloud based solutions. They are more difficult to integrate with cloud based applications and costlier to support - users must download and install upgraded software when needed. They do not necessarily play well on all devices and operating systems. Their older interface may turn off younger employees.

But don't raise your eyebrows at the businesses that invest in on-premise applications in this cloud based world. These applications, when purchased for the right reasons and used by the right people, can offer a much better return on investment than the latest, greatest and coolest cloud based options. Just being cool doesn't mean it's the best business decision. Sometimes old school does the trick.

Should You Get a "Free" CRM?

Zoho Corporation - who offers customer relationship management and other business applications to small and medium sized businesses - released a lighter CRM product called [Begin](#) that also comes with a free version. This is not a new thing. Many other excellent and popular CRM applications, from [Insightly](#) to [Agile CRM](#), also offer "free" versions of their products. Chris Hawkins, writhing for data connector Zapier, provides a great summary of a few of these products [here](#).

But are free CRMs worth it? They are, as long as you understand why.

For starters, most of these free versions accommodate very few users. In Begin's case, you can only have one or two users at a time. Some, like Agile CRM will allow up to ten users. But for the most part, a free CRM application is really just for an individual to use as an individual contact manager. You will find many of the features offered to be similarly found in office products provided by Microsoft 365 and Google G Suite such as creating contacts, taking notes and creating tasks. If you have - or plan to have - a workgroup of more than a few people then you'll quickly run into limitations that will force you into stepping up to the next paid level.

The features offered by free CRMs are limited, but enticing. Most of the popular versions will give users the ability to create a few opportunities and simple campaigns. Begin will allow tracking "multiple pipelines", sending and receiving emails and even integrations with other Zoho and outside applications. Agile, Zoho and Insightly will even let you create a workflow or two to automate some of the things you do like auto-responding to messages or creating follow-ups based on a prior activity. The purpose of all this is to entice you into wanting more and therefore upgrading to the next version.

This is a good thing. You want to be enticed. Moving up to the next version means that you've accomplished something: you're working with a CRM application well enough to want more. Using a free CRM will help you avoid costly mistakes when deciding and ultimately implementing your final product. Because-let's face it-you're not an expert in CRM. You're not an expert in these products. For you to fully understand an application's strengths and weaknesses you're going to need to take it out for a spin, and not just a test drive but a long meandering journey.

So, if you're researching a CRM application my advice is for you to start first with a free CRM. Maybe it's one of the products I mentioned above or maybe it's a trial version of another product (by the way - many vendors say that trials are good for 30 days but most will extend the time period for another month or two if you ask).

I recommend that you pick a good, independent person or two in your sales and service team and ask them to jump into it. Have them use the free version for a period of time and then report back their findings. If all goes well, you can start expanding the usage throughout the company and you'll be encouraged to start paying. You'll also have an in-house person now that - while not an expert - is certainly more intelligent about the application's capabilities and will be instrumental in mapping out how the application will be used company wide.

You might decide, after using a free CRM for a while, that it's not exactly your cup of tea. It may also be the cause of you deciding not to get a CRM at all because you or your organization doesn't have the culture for it. Good.

Disqualifying a software product can be every bit as profitable to you as moving forward with one. You didn't waste your time. You got smarter about what you need and what you should be looking for. Your next choice will be even better. I have some clients that worked their way through two or three free or trial CRMs over the course of a year before settling in on the one that's best for their organizations. I have other clients who abandoned their CRM search altogether after discovering that they actually needed a different application, like something for e-commerce or order entry.

Those clients have done well with their choices. But they wouldn't have had the choice if they didn't use a free product for a while. Free is good. Paid is better. Use both to make your decision.

What's the Best Small Business CRM For Gmail?

Many of my clients who are looking for a customer relationship management system ask me: is there a specific offering that works with Gmail? To answer that question, you have to define what "works" means.

Gmail is really two things. It's a web-based mail client (or application) that you can use from any device in a stand-alone manner. It's also, when you subscribe to G Suite, an email server, not unlike Microsoft Exchange, where you can connect other email applications to it, including email applications that come with some CRMs.

There are three types of CRMs that work with Gmail. Some - like [Zoho](#) (which my company sells), [Sugar](#), [Insightly](#) and [GoldMine](#) (which my company also sells) - have their own, built-in email clients that can connect to Gmail's server to send and receive messages. Others - such as [Salesforce](#) - will just quickly integrate with Gmail right out of the box via a plug-in and then synchronize messages back and forth. And then there are a few - like [Copper](#) and [Streak](#) - that work right inside of Gmail.

In the end we all want the same thing: a simple way to send and receive messages so that all of our email communications are stored in the history for each contact and account in our CRM systems and can be shared (with permissions) with others in our group. That way when a customer or prospect reaches out the team's got their entire email history at their fingertips. So, what's the best option for integrating Gmail with your CRM? The first thing you need to do in order to get the most out of your Gmail integration-without any limitations- is to subscribe to Google's G Suite of business applications. Once you do that, there are essentially two roads you can take.

Going Inside of Gmail

If you want your CRM system to be imbedded inside of Gmail I recommend looking at either Copper or Streak. These applications "super-charge" your Gmail in-box and give you a Google experience on hyper-drive. They enable you to manage your prospects, leads, customers and pipeline right from inside of Gmail and-assuming you're a G Suite user-your data will not only be synchronized with your Google contacts and calendar but with most of G Suite's apps including Slides, Sheets and Meet.

Both Copper and Streak's most popular versions come with mobile apps that will work on iPhones and Android devices and cost about \$50 per month per user. They include workflows, automation and reporting. They also integrate with other popular small business applications like [QuickBooks](#), [Xero](#), [HubSpot](#) and [MailChimp](#). Copper has a growing number of

implementation partners that can help with your setup and training. Streak has robust capabilities for mass emails. Both applications have been around for a while (Copper, formerly known as ProsperWorks was founded in 2014 and Streak launched in 2011) and both have received mostly positive reviews for their interface and support.

When I speak to clients that use these products, I generally get good feedback. However, the biggest limitations I hear is that both applications' functionality are mostly for lead management and sales pipelines. That's fine if you're a small business and need a simple, yet robust sales tool inside of Gmail. But what if you need more? That brings me to the second road you can take.

Integrating with Gmail

Some companies want to use their CRM for more than just lead management or to track sales. My company integrates our CRM with our website. We do quotes. We track service issues and run relatively advanced campaigns from within our CRM, which is Zoho.

However, because Zoho comes with its own built-in email application, we use Gmail as our company's email server, so our need is less to be inside of Gmail but to integrate with Gmail. Zoho does that well. Although it does integrate with Google's contacts and calendar, because Zoho isn't built into Gmail like Copper or Streak, it doesn't integrate with as many Google applications. Also, we're forced to use the capabilities of Zoho's email functionality, including spam filtering, which is not as robust as Gmail's. But on the other hand, we have more features and applications available to us – like accounting, projects and campaigns - as part of Zoho's business suite than if we were just using Copper and Streak.

As mentioned above, some CRM applications – Salesforce being the most prominent – forgo their own email application and just give their users the ability to quickly integrate with other popular email apps like Outlook and Gmail via a plugin. This way if you want to send or check your email, the application literally calls up a Gmail window and you do the work through there. All messages sent or received will be saved inside of your CRM application. If that capability isn't available out of the box, it's likely that you can use a connector like [Zapier](#) or [Workato](#), to accomplish this. Google publishes a large list of CRMs and connectors that have integration capabilities on its [G Suite Marketplace](#).

The bottom line is that just because you use Gmail doesn't necessarily mean you have to get a CRM that's built into Gmail. That's nice, as long as you're willing to work within their limitations. But most, good CRMs today will easily synchronize with Gmail and, although not perfect, the synchronization tends to work well.

The One Big Problem with These 11 Open-Sourced CRM Applications

A shout-out to Ankush Das, a tech blogger who put together a [really nice list](#) of 11 "open-source" CRM applications for the Linux-focused website It's FOSS.

Das recommended products like [SuiteCRM](#), [Vtiger](#), [EspoCRM](#), [YetiForce](#) and others - both well-known and more obscure – and they all represent a good variety of choices for companies that have a developer mindset.

Open source products like the ones included in Das' list mostly come with the ability to be hosted internally or by a hosting provider, offer free and paid versions based on either the number of servers or users and include documentation and support provided by the application's developer communities.

But with so many out of the box, mainstream CRMs available on the market today, why would you consider an open source product for your business? For most that take this road it's about one thing: freedom. They hate to be a slave to a software company's annual fees, support contracts, forced upgrades and customization constraints, let alone expose their data to the security policies of a third party. People want more control and open source gives you the ultimate control.

There are other strong arguments in favor of open source CRM. Instead of starting from scratch, you can begin with an application that already has built in features and then create your own system that specifically does what you need it to do. You're not confined by the vendor's limitations. You can build something that matches your company's processes rather than having to conform to the vendor's. You can create a solution that would not only be used internally but can then be packaged up and sold to others in your industry, should you have an interest in getting into the software business.

Open source CRM has advantages, for sure. But for those companies that ask me whether this type of solution is right for them I always make sure that they're aware of one big problem: freedom.

Advocates say that these types of solutions give you the ultimate freedom to do what you want. To me though, it's the opposite. Your freedom to build your solution, create new features, integrate it with your website, ecommerce platform, accounting system and other applications and then ensure the needed support, scalability and security rests with your development team. The open source vendors mentioned by Das are all good but they're not going to help you once your developers start making changes to their code. Your developers are going to become the

masters of your system and if your system becomes core to your business - a likely scenario - then you will be completely reliant on them. Is that freedom?

So, what about the future? What happens if your developers leave? What happens if you have a falling out? What happens if your developers decide to go rogue, believing that they know what's best? Most importantly, what happens if you decide to sell your business and a buyer – who will be very interested in your CRM data - is put off by the propriety of your CRM application? I've seen this happen. With a traditional CRM system, you can turn to the vendor's partner community and they can undo what's been done. With an open-source CRM you're going not going to have as many options, if any.

I don't want to dissuade from going open-source because the risks I mention may be outweighed by the benefits of having such a flexible, customized system. But if you do want the freedom that these types of applications can provide for your business, just be aware of the freedom you may be risking if you choose to go down that road.

These Are Five Questions You Need to Ask on Your Next CRM Software Demo

Ugh...you've agreed to sit through an online demo of a Customer Relationship Management (CRM) application? I know - those things can be tedious. But they're important. To choose the right CRM application you need to see it in action. So if you've agreed to that demo, here are a five questions to ask. Note that these are open-ended questions, not just ones that elicit a yes/no response. Be patient, but tough on the presenter – he or she will be on to the next opportunity just as soon as you sign up, so now's your chance to ask everything you need.

"Show me how your product integrates with E-Mail."

Let's face it: email is far from dead, and if you're like me you're using it throughout the day. How a CRM system handles emails is critical to your group's sharing of knowledge. Does the application have its own internal client? Does it integrate with Outlook or Gmail? How? Are messages stored in a contact's history for all to see? Can some messages be made private? Is the process seamless and easy? Can the system send mass emails? Make sure you're very comfortable how your CRM treats email - it will make or break your busy day.

"Show me how your product handles the calendar."

For a CRM to be useful you need to know where everyone is, where they're going and where they've been. So have your presenter show you its calendaring functions. Does the calendar integrate with Outlook or Google? How does it work from a mobile device? How easy is it to schedule an activity for yourself? For others? Speaking of others, can you view others' calendars? How do reminders and alerts work? Make sure you're happy with the application's calendar functionality so nothing falls through the cracks and everyone's on the same page.

"Show me your pipeline report. And other reports."

Reporting is essential if everyone's going to use your system the right way. Remember - your CRM system is just a database and you'll need good reporting to help you use the data to manage your business. The Pipeline Report – which shows open quotes or opportunities - is the most popular report used by all of our clients - check to see that it looks satisfactory to you. How easy is it to customize? What other reports are there? Check out how it all looks.

"Walk me through your support process."

When your system has a problem it can bring everything to a standstill. That's why it's still critical that your software provider has a good support operation. But don't take their word for it.

Give the demonstrator a specific example to walk through, like "let's say I'm getting an error message, show me how I would report this." Is it all web based? Is there a customer service number? Is there live chat support? A knowledge base? A vibrant community? When (and I do mean when) you have a problem you just want it fixed quickly so you - and everyone else - can get back to work. So how easy and quick is it for the software developer to fix problems? Let them show you.

"Tell me about your partners."

Great CRM systems have great partners. There are implementation partners like (ahem) The Marks Group and there are software partners that build integrations with other applications. A software's ecosystem will be critical to help you get the most out of it. How easy is it find a partner? How easy is it to find an add-on? Do your partners customize the product? Train? Support? Can you use a product's partners to help you integrate your CRM with other products? Are they local? Are they certified? Today's CRM systems all have very similar features - it's how they're implemented that determines whether a company succeeds with one or not.

Of course, there are other questions you can and should ask on a software demo. But believe me - the answers to the five above will quickly determine whether the application - or the company making it - is right for you.

MARKETING WITH YOUR CRM SYSTEM

Be a Better Salesperson

Every business owner is a salesperson and I'm no exception. Even though I run a ten-person firm and spend much of time on managing people, running projects and marketing, I still find myself involved in most new client deals. I get leads from all sorts of different places and then it's up to me to carry the ball through to close. I have met plenty of amazing salespeople over the years, some who could literally sell snow to an Eskimo in January. I am not in that league. But I think I'm still pretty good at selling. And I've been relatively successful at it. Over the past twenty years I've developed a few characteristics that have helped me close more deals and generate more cash than average. Let me share four.

I'm a responder. I answer emails quickly. I return calls that day. I use my CRM system to make sure nothing falls through the cracks. I forward requests to others in my firm and I follow-up with them too. I make it a point to touch base with my prospects (and clients) frequently. I hate it when people don't respond to me in a timely manner, and I know I'm not alone. It's important to me to not be one of those people. I lose deals for plenty of reasons, but lack of communication is not one of them.

I'm an educator. I sell CRM software every day so I know our products and our competitors really well. I'm an expert in this field, like all salespeople are experts in their fields. The typical person dipping their toes into this area is usually overwhelmed by choices and data. My job is to help them with the decision. I make recommendations. I suggest which of our products could help them and usually (and this is true) also recommend competitive products that could help them too. If a prospective client chooses to do business with me, I want that person to have done all the research possible so they're comfortable with the decision. If they choose to use a competitive product because it's a better fit, even one I've suggested, then I'm happy for them – and this oftentimes leads to referrals from them as an appreciation of the help I've provided. In the end, it's not about me. It's about them.

I'm a disqualifier. I don't want to waste my time and I don't want to waste a prospect's time. I like to cut to the chase as fast as I can. I like to talk dollars right up front. I like to lay out the good, bad and the ugly that a client will encounter with the products we sell. I like to talk about our project failures and why they failed. I've learned that it's better to scare someone away now then deal with an unhappy mess months later. I want to find out if a client is really ready, both financially and emotionally, to adopt a CRM system as their culture. If, after spending a half hour on the phone, we determine this is not a good idea then it was a good half hour spent. I've learned to focus on those clients that are really ready, and to just keep in touch with those that are still considering.

I'm a cheerleader. I love the products I sell. I believe that every business, no matter the size or industry, should have a CRM system. I'm an evangelist. I'm a cheerleader. I want my passion for my products to rub off on my clients and prospects. I want to see them happy and productive and loving their system. Good salespeople are like that – they truly believe that what they sell is helping people. It is their little contribution to the world. They're proud of their jobs and their companies.

Good selling, everyone!

Track These Customer Service Metrics

If you've got a customer relationship management relationship system (CRM) you're probably using it mostly for sales and marketing. And that's understandable because CRM systems have generally been sold as a sales and marketing tool. But you're missing out. You're missing out on maybe 50% of what a great CRM does. Because most CRM systems today have the capacity to track service activities. And the smart business owners I know are using their CRM systems as much for service as they are for sales. Why? Because delivering great service is the best way to generate more cash, and because keeping customers happy is the best way to grow sales. And to do this, they rely on these four customer service metrics.

1 - Open Issues.

What are the issues? Where are the problems? No one likes to hear of these. But they're critically important. You can't ignore them. The smart managers I know seek out problems instead of pretending they don't exist. To do this, they demand a report (sometimes daily, or at least a few times a week) of open issues. It's easy to track problems in your CRM system. You can schedule and code a service issue as a simple open task. Or, depending on your system, you can create tickets, calls, incidents or issues as a separate thing to track. It doesn't have to be complicated. But you do want to make sure you're tracking a few key things: the customer (of course), the issue, who's working on the issue, when it was opened, when it's expected to be resolved, what tasks have been done and what tasks are scheduled. Maybe a customer is so significant that it requires the owner's call. At the very least you won't be embarrassed if you hear from a customer and you're not even aware they're having a problem. A problem could be an opportunity to sell them more services or products, or at the very least show them how important they are to you by giving them extra attention. You'll never know this without an open issues report.

2 – Closed Issues

Sometimes issues are opened and closed and you might never hear about it. In many cases that's a good thing because it's important to get problems fixed as quickly as possible. But you still want to know. You want to understand what problems are occurring. And, every month or so you want to ask for a Closed Issues report and look at the metrics there. Who was having the most issues? What type of product was generating the most problems? Is there a pattern? Could this lead to more problems at other customers? Knowing the problems you've had each month and the customers who had them will significantly help you improve your company's quality and responsiveness.

3 - Time to Resolve

Some of my clients include this metric on the Closed Issues report mentioned above, while others like a separate report showing each issue and how long it took to resolve it. This is critical

too, because no one likes to wait around for a problem to be fixed. This report is sometimes combined with an alert or workflow because although it's important to know that a particular issue took a longer time than average to fix, it's more important to get alerted while this is occurring in case you need to expedite or get involved. You may decide to have service level agreements for your customers, where those who desire can pay extra to be classified as "Gold" customers, entitled to additional and quicker support. If this is the case, it's even more important to understand the time it takes to resolve product issues and to get alerted if these customers are involved.

4 - Customers Without Contact

This is a metric that I learned the hard way. I learned this when a good client of mine left us and went to another firm because he felt he was being ignored. It's not enough today to just wait for a customer to call. Good companies stay proactively involved with their customers throughout the year. Customers that get ignored will tend to feel ignored and seek TLC from someone else. So configure your CRM system to either generate a report or send you an alert when a customer hasn't had contact from your staff, either in the form of a phone call or appointment, after a certain period of time (I use 6 months). That way you can be certain that these customers without contact don't fall through the cracks and potential revenue goes walking away.

See? Your CRM system isn't just for sales and marketing. It's a cash-generating tool for customer service too. And having a few key customer service metrics will enormously help you keep your customers happy. And wait...isn't that what sales and marketing is all about too?

Change Your Daily Email Habits

Regardless of the popularity of social media, texting and other forms of messaging e-mail still remains the number one tool for communication in the business world. According to one report I read recently "...e-mail remains a significantly more effective way to acquire customers than social media—nearly 40 times that of Facebook and Twitter combined (exhibit). That's because 91 percent of all US consumers still use e-mail daily, and the rate at which e-mails prompt purchases is not only estimated to be at least three times that of social media, but the average order value is also 17 percent higher." E-mail is so prevalent in our society that more than 81% of people are checking it outside of work.

Being good at email is essential to generate happy customers and more cash. But, no offense, you're using it badly. At least most people I know are. And I used to, too. But I think I've gotten better. That's because for over twenty years I've spent a significant part of my day on-email so I've learned a few things that have helped me improve my daily e-mail usage. And I'd like to share them here.

Keep it short. If you can't say it in just two or three sentences then it probably shouldn't be in an e-mail. This is the 21st century, the age of BuzzFeed, Business Insider and 300 word 'snackable' blogs. No one has the patience to read through your long e-mail. Get on the phone. Always ask to attach. Never send someone an attachment unless they're expecting it. Attachments slow down email because of their size. And they create a potential security risk. Reply. If someone that you know says hello to you on the street you say hello back, right? So why don't you quickly reply to someone you know who e-mails you? Just a quick acknowledgement – "thanks, not at this time" or "swamped, will get back to you soon" makes all the difference in the world as opposed to the virtual smack in the face to that person you know who when you don't even recognize their existence. This takes 30 seconds. It makes a difference.

No negative emotions. If you're angry, hurt, frustrated, or experiencing any other emotion that will reflect negatively on you and your relationship keep it out of an e-mail. And for God's sake...no profanities. I, like everyone else, have sent countless e-mails to people that I'd like to have back. Regardless of many of the major email services attempts, after a while you really can't un-send an e-mail. And God-forbid if that angry reply you wrote at 2AM is copied to others. You'll regret it come 9AM. Save it as a draft and read it 6 hours later before sending. Here's what will happen: you won't send it.

Don't make me feel like I'm on a list. Sometimes I get an e-mail from someone that's addressed to the sender because the sender created a list in Outlook and I'm on it. Other times I get an e-mail with no personal greeting and in different fonts throughout the message – clearly a cut and

paste job. It makes me feel even more meaningless than I already know I am. If you're going to send an e-mail to a list of recipients take the time to make it personal. People like a little personal attention – or at the very least some evidence that the sender went to the effort. We are all just little dots of light in a limitless void of darkness and infinity. Does your impersonal email have to remind me of that? Geez.

Have a signature line. Many times I'd like to (gasp!) call you or even add you to my CRM database. If you're going to e-mail me then help me out with a signature line. It shouldn't have a lot of graphics (graphics slow down e-mails and cause them to get caught in spam filters). But it should have your company, address and phone numbers. Every professional corporation requires their employees to do this. So should yours.

Last but definitely not least, check your grammar and spelling. There is nothing that shows ignorance more than an e-mail with bad grammar and mis-spelled words. Seeing "there" instead of "their" or "were" instead of "we're" makes me cringe. Sometimes I'm not sure if it's because the sender is uneducated or if he's just careless. But either way it just looks bad. When you finish composing your (very short – see above) e-mail, take an extra minute out to read through it and make sure it's professional and looks right.

These are the little things that make a big difference in our little world. And let's face it: e-mail communication remains a big part of our little world, and a big part of making sure your cash flow stays positive.

Try Disqualifying These Lousy Customers

To succeed in business, you need cash. To generate cash, you must succeed in sales. And to succeed in sales you need to find good customers. And to find good customers you must be very good at disqualifying the bad ones from the good. Are you good at this? I've gotten better over the years. In fact, there are three types of prospective customers that always raise my antenna. The Penny Pincher. This is the guy who questions every price, challenges every fee and calls into question every cost. He asks for discounts and more discounts. He acts shocked when I tell him our hourly rate. And he'll always behave like this even after he says something like "you know, money is no object." I don't feel that our rates are too high and we never overbill our clients. So, I become very wary of someone who insinuates this only after just having met us. It starts the relationship out on the wrong foot. Everyone has a right to question costs and negotiate the best deal possible. But anyone who's successful at negotiating will tell you that a successful negotiation is when both sides believe they came out as winners, not one side feeling cheated. We want customers that are smart about how they spend their money, but they don't pinch pennies just for the sake of it. Good customers see the long-term return on investment for the money then spend with us. A customer that's overly cost conscious, one that cuts corners or doesn't spend what's necessary or just...well...cheap...is a long-term problem.

The Unprofessional. This is the prospective customer who treats us poorly. He keeps us waiting. He doesn't reply to emails or calls. He even goes so far as to belittle what we do. This is the person who happily admits that he "fired the last firm" he worked with or "wasn't born yesterday" when it comes to the services we provide. He makes many requests, requires a great deal of our time and never seems to understand our responses, although he claims he does. He just views us as a thing, a necessary evil, another vendor...and not a partner. Most importantly, and of my biggest concern, is that he treats my staff poorly or unprofessionally during the discovery process – making disparaging remarks, missing meetings or waving off our requests for more information. We want long term relationships with our customers. We want to be respected and valued. At the very least, we want to be treated professionally and with courtesy. This type of behavior is not a good indication for the future.

The Genius in His Own Mind. This is the prospective customer who doesn't know everything, but wants us to think that he knows everything so that we don't realize that he doesn't know everything. He's got it all figured out. He gives us business advice and challenges sometimes frivolous things just to show that he's knows what he's doing (ever though we've already figured out we know he doesn't know what he's doing). Good clients are genuine. They are hiring us because we do something they don't and they have the self-confidence to know that they don't know everything and that there are people and firms who do know more things than them and they can profit from that. We get it – the Genius is probably very good at what he does. But he doesn't have to pretend that he knows everything about everything, particularly the things that

we do. We don't want to have a long-term relationship with someone who will be second guessing us.

Do I disqualify these prospective customers entirely? Do I not to do business with them altogether? Not necessarily. I'm running a business. I have payroll to cover and overhead to meet. Sometimes walking away from a prospective customer is the right thing to do. But other times it's more important to just be aware that this customer is not a good one and to prepare accordingly: increase prices, allocate more resources or keep a very close eye out.

Get Better at Evaluating Leads

My company sells customer relationship software. We also do other technology consulting work. Our more than 600 clients sell cars, construction projects, legal services, pipes, paper, film and 401K plans. You name – they sell it. We all get leads. And we all, to some degree, use the lead management functionality in our CRM programs. But these are just databases. And the data is only as good as the people putting it in.

There are leads and there leads. Your job as a sales and marketing person is to categorize those leads. Is this a good lead or lousy one? A big one or a small one? Worth pursuing or a time waster? Correctly quantifying the value of a lead as early as possible will ensure that you and your people are spending the right amount of time. I believe that there is no such thing as a bad lead. If someone has raised their hand and shown an interest in your products or services it means that he's a buyer...now or someday. The trick is determining where the money is now, and what can wait. And it's all about asking the lead a few questions.

Three questions, actually.

Where are you in the process? You will have a different conversation with a prospect who is at the very beginning of his search versus further into it. If he's at the beginning of the search you are going to spend more time educating. You will need to be more patient. And, after laying all the groundwork and providing your excellent information, you may very well have your deal whisked out from under you by someone who comes in later on with a better deal. You should have good documentation, websites and resources to share with the prospect so that he can do more research on his own at this early stage in advance of you getting more involved when he's a less-ignorant buyer. And you'll have to set your expectations that this deal may not close for a while (if at all) once this person starts getting more info that may put him off doing anything. What do you think of our pricing?

This infers that you have shared your pricing with the prospect. You need to do this as early as possible. Some salespeople like to hold off on disclosing pricing while they "build value." That was nice in 1970. Today, people want information now. Immediately. And this benefits you too. If a prospect is blown out of the water by your pricing you want to know that sooner rather than later, right? There's no sense in spending any more time with someone who can't afford your products or services. At best, maybe you can direct them to another offering of yours or even make recommendations that will leave him feeling good about your conversation. Talk about money right away. Don't beat around the bush.

Why? That's it. Just... why? Why is this guy talking to you instead of one of your competitors? Why is he interested in your products and service? You need to understand what's behind his motive. You need to determine as early as possible his issues and most importantly whether your product or service is the right one to solve his problem.

If it is (and he's got budget, and he's further along in the process) you've got a good, qualified lead that can potentially generate good, green cash. And now you've got some good information for your CRM's lead management system that can be categorized for specific follow-ups and ongoing communications. It's time to put your sales hat on and go!

Sell Girl Scout Cookies

Actually, I'm just kidding. You don't have to actually sell Girl Scout cookies just to generate cash, even though I admit that a couple of Thin Mints can bring a smile to anyone's face, even in the darkest days of winter.

But let's pretend you want to increase your sale of Girl Scout cookies – or any product – so that you can generate more cash. Maybe you've never sold anything before. How can you succeed? Don't worry. I can help. I've got five good ways for you generate cash and sell a ton of Girl Scout Cookies...or just about anything else for that matter. Ready?

First, pick a good location. This is obvious. Good salespeople follow the money. They target customers that have a need and have the budget. You're looking for high traffic spots. Camping out at the local supermarket is always a good choice. Or a highly trafficked mall. A local sporting event or a popular school activity where both parents and kids go. Stake out a lobby of a busy office building or the entrance to subway or bus stop during evening rush hour. These are just some of the places where people walk...and where they get hungry. These are your markets.

Give stuff away. Never be afraid to let your customers try your wares. Studies show that the more people get to touch, play with or taste a product the more apt they are to buy it. Always have samples out on your table. Don't resist from opening a box if a customer wants to try a new flavor. In the long run, the cost will be returned. Oh, and considering giving away freebies too – like offering a free box if a customer buys 10. People love getting deals. Share the wealth.

Partner with others. Don't just rely on your location to sell your cookies. Get others to sell for you. Bring boxes to local stores and other organizations and ask if they'll help sell, or at least display your cookies. Share in the profits if they so demand (which is probably unlikely unless you're partnering with the Grinch). More importantly, give something back, like offering to display flyers, business cards or postcards from their store or organization on your table so that you customers can find out more about them too. Maybe you can do a contest together. Or ask if they'll contribute something free to a customer of yours that buys in bulk. You're not the only one looking for customers. If you help your partners succeed, you'll succeed too.

Be accessible and convenient. You'll need your parents for this one. And a little technology. But they'll help. Get a smartphone (or borrow your parents) and let everyone you know that you'll do everything possible to sell them cookies...no matter where or (reasonably) when. When people need cookies tell them to text or email you. Respond quickly. Offer options – maybe reserve a box for them to pick up the next day when you're selling at the supermarket. Or schedule a delivery run with your mom and dad to drop off boxes in neighborhoods. Always

have lots of spare change. And can you accept credit cards? There are plenty of mobile payment systems around so maybe think about that too, if mom and dad would help. Make your sale as convenient as possible. Respond to your customers' requests. Be accessible.

Most importantly: collect data and stay in touch. Think long term. You're probably going to sell those cookies next year, right? Or know someone else who does? So build on your success. Every customer who bought from you this year is likely a customer for next year...automatically! Do your best to get the names and email addresses of everyone who buys cookies from you. Tell them they'll get special offers next year. Put this information into a database. Then next summer, email everyone a great recipe using Girl Scout Cookies or a fun story about the Girl Scouts. You're just keeping in touch. And next January email them again offering a discount if they buy from you. Maybe you can accept pre-orders or schedule deliveries in advance. And when the cookies go on sale let them all know where you are and how valuable they are. When you get too old, hand down that database to your little sister or a younger member. It's all about keeping close with your community...a community of people who love those Girl Scout cookies!

Girls, welcome to sales. I'm in sales in too. Girl Scout cookies are delicious, but selling them isn't as easy as it sounds. None of these ideas are easy. Nothing's easy in life. Success takes a lot of hard work, discipline and patience. You'll have to be dedicated and goal-oriented. That's what it takes to sell a ton of Girl Scout cookies. In fact, that's what it takes to sell a ton of anything. Ka-ching.

Make Your Customers Happier

How do I know when my customers are happy? It's simple: they pay. When a customer gives me their hard-earned cash usually means they're satisfied with our service, or the products we sell. But of course, we need to do more. So, we do. Let me share a few other things we do to keep our customers happy, in addition to doing good work for them.

We give stuff away. For my company it's chocolates. Who doesn't like chocolates? Every month I have a reminder in my calendar to send one customer a box of Godiva chocolates with a card that says thank you for being our customer. I do this randomly. It costs about \$35 every month. And every time I get an email or a call saying thanks back to me. People don't do this enough. A simple box of chocolates. A fruit basket. A card. Every month. Each time to a different customer.

We stay in touch. Every customer in our database is flagged for follow-ups. We have an alert configured in our customer relationship management (CRM) database to let me know if any customer has not received a phone call or visit from someone in my company in the past four months. We have a monthly newsletter with advice and information to help our customers. We make it a point to "touch" everyone at least once or twice a quarter so they know we're there and we want to help.

We respond immediately. Customers, like everyone else on this planet, hate to be ignored. We make it a requirement that when a customer asks a question, sends an email or calls us we respond immediately. Even if we don't have the time to fully answer their question we at least acknowledge and give the customer a time frame when we will get back. I share my cell phone, email and Skype ID with all of our customers. So does everyone else in my company.

We are available all the time. Another business owner once told me that she turns off her cell phone after 6PM. I get this – it's important to have balance. But sadly, in today's business environment, there is no turning off a cell phone, no away message, no out of the office response. We live in a 365/24/7 world and our customers expect that. We sell to companies in different time zones. We have customers of all ages and personality types. Some of our customers work in the middle of the night, others on Sundays. And to succeed today you have to be available. That is why we have smartphones. That is why we have alerts in our CRM system. To that business owner who turns off her cell phone after 6PM my advice is to hire an assistant to be available in the hours when she's not, if only to acknowledge a request or schedule a time to fix a problem. If a customer can't reach you quickly, you're going to lose that customer.

We sell for them. Customers love it when you sell their services. You love it when others recommend you. We do this a lot. When I visit companies of course I'm looking to sell our

technology services. But I try to keep my ears open for other needs, particularly things we don't do. We have over 600 active customers who do 600 different things, from plumbing to landscaping to accounting to surveying to selling plastic products and corrugated containers. If I see a chance to recommend a customer to another customer, I jump on it. Everyone is happy. And that happiness ultimately reflects on my company too.

Did I mention the most important thing? That's just doing what you say you're going to do and delivering your products and services on time and charging a fair price. There's no better way to generate cash than that.

Use These Marketing Technologies in 2024...and After

Do you want to improve your marketing? Then stop marketing. And start educating. Things have changed since the days of “Mad Men.” You don’t sell. You nurture. You help. You teach. You stay in front of your prospects and customers as often as you can, without being too intrusive, and provide them with helpful information to make their lives better. You can’t put a gun to your prospect or customer’s head and say “buy from me NOW!” All you can do is keep you and your company in their thoughts so that when they do need something that you provide, they’ll think of you first.

The good thing is that there are plenty of great, inexpensive technologies to help you do this. For example:

There are email services, like [Constant Contact](#), [Jangomail](#), [MyEmma](#), [MailChimp](#) and others. These are reputable and popular ways to keep in touch with your prospects and communities. They’re inexpensive. They have easy to configure templates and great metrics to track who’s opening, reading and clicking on links in your emails. No matter what business you run you should be sending newsletters, updates, bulletins or helpful hints and messages to your audience using an email service.

And not just one email either. You need to segment your database and send multiple groups of emails that are relevant to your recipients, not just one generic message.

There are printing services. Yes, printing. Because not everyone reads their email. So look at [Vista Print](#), [Print Place](#) or the many other companies who provide similar services. Here you can create a simple, but effective, postcard to mail out to your community. Put a photo on the front and a story on the back – don’t make it all about you. Use good, free stock photography from [MorgueFile](#) or [Getty Images](#). Even with postage it costs about a buck a card to send and if you do this for a long enough period of time, people will expect to get your messages and read them.

Send voice and text messages. I like [VoiceShot](#) for calls and [Tatango](#) for texts. There are people in your community who prefer to get phone calls. There are others who only want texts. Now there are services, like these, that can do this for you en masse and inexpensively. Remember, these are OPT IN.... you always want to get permission from your customers or prospects to contact them in this way. But once you do you can use services like these to update them on important issues, price increases, new products or service concerns of interest.

And don’t forget social media, of course. That’s because, depending on your customers, you may have a large community on [Facebook](#), [Twitter](#) or [LinkedIn](#). And if that’s the case then

you'll want to devote resources (i.e. people) to monitor your sites there, update with new information, keep things active, respond to customer messages and build your community.

In 2024 (and beyond), there are plenty of marketing tech tools available to help you stay close to your community. But the most important thing to remember? Don't use the marketing tools for marketing. Use these tools for education. Offer tips, advice, helpful hints and content that will be interesting and helpful to read. That will keep your community involved and interested. And it will ultimately lead to a closer relationship and more sales.

E-MAIL

E-Mail Remains the Most Popular Form of Business Marketing, According to Multiple Studies

One of my pet peeves is when I ask a company what their CRM application is and they say something like "Constant Contact."

With all due respect, [Constant Contact](#) is a great e-mail marketing platform. But it is not a CRM application. Your CRM application is a database. E-marketing platforms like Constant Contact are not. Your CRM system is where you store all of the information about your customers, prospects and community. You segregate and target that data. Then you send it over to your email service application.

You do all of this because when it comes to marketing, email still rules. Don't believe me? Then just take a look at three studies.

The first, [a survey](#) of more than 200 marketers at major North American brands in June 2019 from marketing agency Merkle found that 68 percent of marketers identified email addresses as their highest priority customer data type to acquire and 78 percent of respondents deliver personalized experiences in email using customer data. In addition, 52 percent of those same marketers said that email remains their most valuable marketing channel not only for gaining new customers but for retaining existing ones.

In another [study](#), Ignite Visibility, a search engine marketing company, found that small businesses with revenues of \$10 million to \$20 million invested more on email than any other marketing tool. Why? Because according to its more than 300 respondents, email is first in return on investment. Interestingly, about 44 percent of those in that category said they spend only between \$5,000 to \$15,000 on email annually.

Finally, it seems that email is also hit in the financial services industry. That's [the conclusion](#) from ad platform Dianomi. The company - and financial services marketing company Gramercy Institute - polled over a hundred senior financial marketers and found that more than a third planned to increase their spending on email marketing in 2020, putting that channel only second to paid search. Overall, financial brands will increase their marketing spend by about 10 percent next year.

The takeaway is clear: email remains one of the most important forms of marketing for businesses and brands. But just remember: CRM is not email. Use your CRM system to collect, store and ensure that it is the best data possible. But then make sure to integrate it with a quality email service platform whose responsibility is to deliver your messages.

Constant Contact Adds a Surprising New Feature

Much of the news today about technology involves the rise of artificial intelligence, bots and other tools that so many are predicting will replace humans in the years to come. So is it surprising when, instead of eliminating, a technology company actually adds humans as a feature to its products?

Not really. At least not to me.

[Constant Contact](#), the bulk e-mail and marketing automation provider, announced a new service that adds a much-needed feature to the software that they offer: actual humans.

Called the Marketing Advisor program, the new service will provide - for a monthly fee - a host of features that most predominantly include access to a marketing "advisor" to help businesses - particularly small businesses and non-profits - get the most out of its tools.

If you sign up, you'll get access to a personalized "advisor" who will participate in monthly half-hour phone calls, provide strategic direction, a customizable action plan and, according to the [company's press release](#), "guidance for optimization activities" like data management, email design and reporting reviews. The program will also include access to private community boards, moderated group chats and other online resources.

"Even small business owners who have a good strategy and get a taste for success need guidance reaching the next level." Kim Simone, Constant Contact's chief transformation officer said. "The Marketing Advisor program offers the one-to-one helpline they need to generate results and make better use of their time."

What Constant Contact is telling its customers is the same thing that we've been telling our clients for years: to be used the right way, some technology needs humans to be truly effective. You don't just install a powerful application like Constant Contact and expect it to magically work on its own, gathering and segregating the right contact data, creating messages and then taking actions based on the results of the campaign. You need people to do that. Most companies (like mine) don't have the internal resources to fully take advantage of the features that CRMs and marketing automation technologies provide. It's like we're paying for a car and only driving on three wheels, in the summer, without air conditioning. Silly.

Constant Contact, like many other sales and marketing software applications, can be a powerful tool to help a business grow. But, like the right baseball bat, rotary power drill or basin wrench the tool is only as good as the person using it. Call them "advisors," partners or consultants,

smartest clients I know use outside resources to help their in-house people get the most out of their technology investments.

Sure, there are plenty of technologies that will replace humans in the years to come. But then again there are some technologies – like CRM and marketing automation – that need humans to truly be effective.

Mailchimp Is Introducing a CRM. So Who's Next?

Mailchimp, the popular email marketing software that's enjoyed by millions of users around the world, is announcing a new Marketing CRM module.

Duh.

I say duh because, well, isn't it obvious? I can't count the number of times that, when asked what CRM application they use, a small business owner replies to me with "Mailchimp" or "Constant Contact" or "Emma" or any number of a group of email marketing platforms.

But the thing is, these applications are not CRM applications. They are, as just mentioned, email marketing platforms. They allow their users to create campaigns, design templates, send out professional looking emails and then track the results. They also give these users the ability to store multiple lists of contacts targeted for their campaigns.

A CRM application does a lot more than just emails, of course. It provides for the nurturing of customers and prospects and provides information that helps companies sell more to them. The best ones manage contacts, accounts, leads, opportunities, quotes, orders, service tickets and other points of data entry. They integrate with calendars, email systems, websites and accounting applications. They track communications, activities, forecasted sales and completed calls. They remind when to contact a prospect, reach out to a customer or follow-up on a problem. That's just a fraction of what CRM systems do.

The smart people at Mailchimp realized long ago that their product doesn't do this. But I can attest that many of their customers think it does. So the solution is...drumroll: to just do it. Which is why the company launched a new CRM platform along with a website builder tool and pricing structure.

"Our email marketing product has helped millions of businesses grow, but our customers have been asking for years for us to build something that would enable them to do all of their marketing in one place," Ben Chestnut, Mailchimp's co-founder and CEO [wrote in a company blog](#). "Small business owners and entrepreneurs don't have time to manage three, four, or five different platforms that each serve one specific purpose, and they don't want their data all over the place: They need a tool powered by data and expertise that will help them know where to invest their marketing dollars."

The new application will enable their users to be able to keep their data under one roof and then better use AI and workflows to leverage this information. It will give them new ways to search, share, tag and organize their data and evaluate a customer's lifetime value. There will be

expanded profiles of contacts so a user can dig into the actions that led up to a purchase, take notes and update a database with preferences and demographics.

“We believe with the all in one platform we’re creating we’re really hoping to establish what it means to be in all one platform for small businesses,” said Darcy Kurtz, the company's VP of Product Marketing [told AdWeek](#). "We feel we have the permission and credibility that we need to play in this space.”

Mailchimp is being careful. They’re calling their offering “Marketing CRM.” I believe there’s a reason for this.

I believe they want to offer what they’re calling a “Marketing CRM” product without stepping on the toes of their many CRM partners. This is why the application lacks basic contact management features, like calendars, activities, emails and transactions typically found in a full-blown CRM. Don’t hold your breath, though. I think it’s inevitable that Mailchimp will add this functionality in the not-too-distant future and let its customers decide their preference. Why? Because they have to.

A few other well-known small business marketing platforms like Hubspot have gone into the CRM business. And popular CRM platforms like Zoho have gone into the marketing business. These companies are doing this because small companies are getting tired of jumping into and out of multiple applications, sweating through integration projects, suffering when connected systems stop connecting and bleeding from the cost of paying developers and implementers (like my firm) to do the work, only to have to do it again and again once something breaks or changes. So, who's next to jump on the CRM train? I'm betting a few of Mailchimp's excellent competitors like [Constant Contact](#) and [Emma](#) are making their plans. Why wouldn't they? Their customers already think those platforms are CRM. They might as well live up to those expectations.

A Startup Says It Can Automatically Get the Email Addresses of Your Website Visitors. Is That OK?

Imagine a world where you don't have to come up with new ways to entice your website visitors to give up their contact information - including those valuable email addresses – when they visit your website. Imagine that, instead of creating whitepapers, events and other "call to action" forms you can just get this information automatically as they browse. Imagine that this information just gets imported into your customer relationship management system, or sent to you on a simple spreadsheet.

That world exists. A startup called [GetEmail](#) says it can do this and for as little as \$50 per month for about 200 email addresses (they also offer other plans, both more and less expensive). So...how? It has to do with cookies. When you and I fill out an online form – like an application or a request for a brochure – the website that receives our data often downloads a cookie - a small data file that contains information about us or at the very least identifies who we are - for future visits and tracking. Sure, we can block those cookies. But most people don't.

GetEmail's code - which is added to your website – checks a visitor's device for those cookies. Sometimes their email addresses are stored in those files. Regardless, the software – by looking at these cookies - can find out where the visitor has previously been online. If that visitor has submitted their email and contact information to a site that belongs to GetEmail's "opt-in" partner network of more than half a billion personal emails then...well, they've got the data. And so will you.

Is this even legal? The company says yes, it is, because all of these visitors have previously – whether they knew it or not - opted in to share their data when they visited those partner sites and, therefore, they are 100 percent CAN-SPAM compliant.

"Our product gives you the source URL and opt-in date for any contact you receive and you can go back and look at the privacy policies of these websites," GetEmail's CEO Adam Robinson told me. "Sadly you'll find that if (a person) gave their information, the website owners are probably entitled to sell it."

It sounds creepy. And it is. But Robinson also contends that visitors who receive an email from you soon after they've been to your website aren't likely to complain or find it intrusive. In fact, they'll probably engage more. "They're already on your website," he says. "It's not as if you're buying a list of people." Robinson says that in the end you'll likely receive the email address for as many as 35 percent of your website's visitors.

So is this OK for your business? I've been trying out GetEmails over the past few weeks and although the email addresses I've received have been significantly less than 35 percent of my site's visitors, I think it is. Why? Because GetEmails is just providing a technology that – according to them – is getting me legally opt-in data which I'm adding to my CRM system. What I do with the data is up to me.

I don't want to upset a website visitor by emailing them. But then again, a prospect is a prospect, and I do agree with Robinson's point that if someone was visiting my website, and I email them, they're likely going to have an interest in the information I'm providing to them. My job is to educate our visitors, not to be too intrusive or bother them. So what I've been doing is just sending two emails after a visit offering additional assistance. If there's no response, then I move on. I've yet to receive a complaint. In fact, I've managed to engage with people that I'm sure wouldn't have connected with me otherwise.

Are you comfortable with this? I guess the better question is whether or not your competitors are. Because that's the world we're now living in.

Adobe's New Offering Aims to Send E-Mails When Your Recipients Are Most Likely to Read Them

Allen Finn, a writer at online advertising service Wordstream, has compiled a bunch of excellent email statistics that every marketer should read.

Among the most eye opening: Email is the third most influential source of information for B2B audiences behind recommendations from colleagues and thought leaders. In fact, 86 percent of business professionals prefer to use email when communicating for business purposes. But it's not just B2C where email dominates. 80 percent of retail professionals indicate that email marketing is their greatest driver of customer retention – almost twice the effectiveness of social media.

The takeaway: even in these days of social media and online advertising, email is not only not dead, but thriving and it remains one of the most powerful marketing tools available. But there's a big problem with email that has continuously challenged marketers: how do get your message in front of the eyes of the right recipient and at the right time so that it will be read? Adobe thinks it may have a solution to that challenge.

The [company announced](#) a series of updates to its marketing applications that not only aims to more tightly integrate its customers' email marketing with other marketing channels, but also to better predict the best times to send emails so that both open and reading rates of its recipients can be maximized.

The company is doing this under the auspices of a new research project and service. It's called Adobe Sensai and it leverages artificial and machine learning capabilities to analyze communications with the aim of determining the most effective time to deliver email to individual customers. Gone are the days of sending a one-time, immediate "blast" to hundreds or thousands of recipients. According to the company, a user only needs to define a start and end window for a campaign and the technology will use history and other factors to figure out the rest.

“We store that data, and so for those individuals we have a good sense of when they're more likely to open an email," Adobe product marketing manager Matt Rawding [told VentureBeat](#). "And then based upon attributes of that individual as we capture new profiles, we try to find patterns for new profiles to try to identify commonalities and ultimately predict when the best time is for an individual.”

In addition to new tools that are being introduced to aid in the creation, tracking and translation of emails for foreign recipients, Adobe is also aiming to solve another vexing problem that has

plagued my clients since...well...forever: frequency. Hitting the right user at the right time is important. But is an email having the intended impact? Are we sending too many emails? Too few? Adobe Sensei aims to figure out that problem too, by measuring each recipient's engagement with a company's email based on the time it takes them to react to a message and the person's response.

Although still in its infancy, today's AI apps being used by CRM and marketing applications are getting better at giving driving directions, recommending restaurants nearby, filling prescriptions and answering basic customer service questions. But stay tuned. Tomorrow's technologies - like the ones Adobe is developing - will not only give marketers and businesses a better and more effective way to reach out to their prospects and customers, but will also help end-users like me to (hopefully) lighten our inboxes and only see the messages that are relevant and at the time I care to see them.

ActiveCampaign Raises \$100M Because E-Mails are More Important Than Ever

There was once a time when people were saying that e-mails were soon to be "dead" and that texts, instant messages and communications over social media platforms would ultimately take over as the main channels for businesses when they communicate with each other and their customers.

But that's not happening anytime in the near future. Sure, there's been a rise in other forms of messaging. But e-mail communications are more important today than ever before, and the medium still remains the most effective means for communication among businesses and their communities. There's no need to go into all the reasons - the Wall Street Journal's Christopher Mims summarized them quite well [in this piece](#) from last year.

However, email has changed. Gone are the days where we use our CRM systems to simply "blast" out messages to our entire database at one time. Today we use software that leverages artificial intelligence and a different kind of user experience to maximize the impact of our email campaigns.

One example of this is ActiveCampaign, a Chicago-based company who last year [announced](#) a \$100 million series B round of financing. Understanding why ActiveCampaign was able to raise this amount of money will help understand how smart companies are using email more effectively.

"When we looked at the biggest needs of emerging businesses, we knew that we needed to solve the hardest part of what was missing – personal connection at scale – in a way that was accessible to every business," Jason Vandebloom, the company's CEO, [wrote in a blog post](#). "Consumers expect their business relationships to be one fluid conversation. They don't want to get an email from marketing when they're in the middle of filing a support ticket, and they expect businesses to know what they need next based on the purchases they've made and their personal preferences."

The company, which has grown to more than 550 employees and sales of more than \$90 million, is one of many competing in the [\\$1.85 billion campaign management market](#) and its competitors - which include firms like [Pyze](#), [Clari](#), [6Sense](#), [Appier](#), [Highspot](#) and [Panoramic](#) - are changing the way businesses are using email as a way to engage both customers and prospects.

This change is all about personalization.

For as little as \$49 per month, ActiveCampaign enables even small businesses like mine to build ongoing campaigns that leverage the data in my CRM system to not only do broadcast emails (like newsletters) but also to trigger individualized messages based on the personalized information of each and every member of my community, including their buying patterns, their preferences, their demographics...basically any data that I'm keeping about them.

Using its proprietary AI algorithms, contacts get their own unique experience. Responses are then tracked and automatically funneled so that a marketing team can better analyze needs. The platform - like others in its category - offers tools for performing tests of various types of email communications to subsets of contacts in order to gauge conversions, opens, clicks and views and determine which messages are most effective. It has contact and lead scoring, event tracking and predictive analysis capabilities and integrates with CRMs like Salesforce.

The company calls this “customer experience,” but really isn’t this just about making the customer feel like they’re not just a number? This is not "blasting" generic, spammy messages. It's about creating a finely-tuned communications process to automatically send unique message to individuals based on their needs and preferences.

So yes, emails are more important than ever, particularly if they're personalized and focused on user experience. But there is one caveat to keep in mind: Powerful applications like ActiveCampaign come with a cost and it's not just their monthly fee.

Tools like this only work best in the hands of a good internal marketing person that is given the time and resources to learn it. Sure, there's automation. But that automation relies on good data, testing and oversight and those functions depend on a smart, human marketer. For it to really work well, you'll need to invest in that resource because even good applications like ActiveCampaign can only do so much on its own.

Ads in Emails? Really? A Study Says Yes.

Here's something I never seriously considered: including paid ads in the body of an email campaign. Paid ads? You would think that in today's world of advertising overload most recipients would be turned off. Turns out they're not.

At least that's the conclusion from a study commissioned by Powerinbox, a company that (surprise!) provides email marketing services and offers what it calls "personalized subscriber engagement" to some of the world's largest publishers so that they can get their messaging out by – you guessed it - placing advertisements in emails.

So, there may be some bias here. But I'm not sure that matters when you consider the findings. According to the study - which was conducted by Mantis Research, an independent research firm - 40 percent of the people surveyed said that having ads in an email didn't bother them at all and - surprising to me - almost two-thirds of them said they would actually click on an ad.

Unfortunately, I could not find where the actual sample size of this study was disclosed. Regardless of the methodology, the results are intriguing. Why aren't ads in an email as big a deal as one would think? Shouldn't people be annoyed by them? The answer comes down to just one word: relevance.

Every marketer needs to understand the importance of relevance, which is why we try hard to teach that lesson to our CRM clients. Trust me, I've learned this the hard way. Back in the day we would often "blast" emails to thousands of recipients, whether they cared about the information or not. Ultimately that resulted in a lot of "unsubscribe" and "take me off your list your @#%*\$#" responses. And those were the nice ones.

People don't want to waste time reading useless stuff and will ignore messages coming from a sender that includes irrelevant information. That's why our best clients leverage their CRM and marketing systems to better segregate their data into multiple lists and then send out different emails depending on what is of interest to the recipient. Yes, it's more work, more content, more data management and more analysis. But it's how effective email campaign management is done.

And besides...it's what recipients want. So let's get back to including advertising in emails.

Of course, the study's results varied by demographic. Older users - baby boomers - were least accepting of ads in their emails while over half of younger generations ranging from 18 to 37 weren't bothered. But despite the generational differences, one thing was clear: as long as the ad was applicable to the reader then people were generally okay with it. In fact, 70 percent of

Generation Z'ers (ages 22-37) would click through on a relevant ad and even those cranky baby boomers - at least 57 percent of them - admitted they would do the same.

"This data confirms what we have been saying all along: email is not dead, in fact it's an extremely effective channel for advertisers when it comes to reaching a captive, engaged audience," PowerInbox CEO Jeff Kupietzky [said in a press release](#). "It also confirmed that content relevancy is critical. That's why using email as a unique identifier, which takes into account known subscriber behavior, is far more accurate for one-to-one targeting than browser-based cookies alone, which can't distinguish between multiple users of the same browser or device."

Of course, he would say that – it's what his company does. But Kupietzky's points are on the mark: relevance is key in today's email marketing, even if advertisements are included in the message.

SERVICE MANAGEMENT WITH CRM

Why Did Service App Zendesk Buy a CRM Company?

Back in the day, the leading internal service software providers - HEAT, Remedy and others - specialized in allowing users on help desks to create tickets, track cases, route incidents, automate resolutions, and build a knowledgebase of problems and solutions. The problem was these applications were expensive, client-server focused and targeted mostly at help desks and information technology teams at larger companies. I should know because my company once sold HEAT.

Sure, products like HEAT and Remedy are still around and continue to have many loyal customers. But all those features that bigger companies were paying for became, thanks to the cloud, available to smaller businesses too, and at a much more affordable price. Service is important for all companies – big and small – and the founders of Zendesk and other applications filled that gap.

This past week, Zendesk announced that it is acquiring FutureSimple, Inc., a company that makes a CRM software called Base. Base is definitely not a service application. It's a sales tool. It provides forecasting, opportunity, contact and sales management features as well as lead scoring and reporting capabilities that allow its customers - who are mostly salespeople - to do the traditional things you would expect from a CRM application. Why the acquisition? "We want to do for sales what Zendesk has already done for customer service: give salespeople tools built around them and the customers they serve," Zendesk's founder and CEO Mikkel Svane [said in a press release](#).

Base brings to Zendesk more than 5,000 customers from around the world and across multiple industries. But that's not the main attraction. It also brings full CRM functionality to Zendesk. It adds a sales component to what was only a service application. The acquisition was necessary because executives at Zendesk realized that a service application alone is no longer enough. Customers want it all.

The companies that purchase a CRM system from my firm usually do the opposite of Zendesk's customers. They focus first on sales. They come to us looking for a better way to track opportunities, leads and prospect data. They're hungry for new customers and think that a CRM system will generate lots of new business for them.

But is this the right approach? I've always questioned that.

Instead of chasing after leads and potential sales, shouldn't we instead be emphasizing service? Shouldn't companies be focusing on keeping their customers happy by answering questions and resolving problems quickly? Shouldn't our customer service people be expert in everything our

companies sell so that they can be recommending add-ons, new products and accessories to our existing, loyal base? Didn't we learn in Business 101 that it's much, much less expensive to generate revenues from existing customers than to go out and find new customers?

Today's knowledgeable CRM users have learned those lessons. They know that it's not just about sales, it's also equally about service. They want their salespeople and customer service people to know what each other are doing. They want a 360-degree picture of a customer - from prospect to sale and back to an add-on sale prospect. To do this they demand not just sales or service capabilities but sales and service capabilities.

Zendesk's acquisition proves the point. The best CRM systems have strong sales and service features and my best clients take advantage of both. The bigger CRM players that cater to larger corporations already offer these capabilities. But the good news is that more firms like Zendesk are catching up to this reality.

LogMeIn Introduces a Better Bot to Chat With Your Customers

For years, the products offered by Boston-based LogMeIn, Inc. have served as great tools for accessing and remote controlling devices. My company has been a long-time user of LogMeIn's application to support our clients. But in recent years - and particularly after the company's 2017 merger with Citrix's GoTo subsidiary - LogMeIn has morphed into delivering an array of customer experience technologies that not only includes advanced remote assistance, but endpoint management, communication and collaboration tools.

In mid-2017, LogMeIn introduced another service to its offerings: Bold360, an "intelligent customer engagement platform" that promises a better way to communicate and address customers' problems and questions.

Last year LogMeIn took another step in advancing Bold360's capabilities with the [announcement of](#) a bunch of new, AI-powered features.

Among them is what the company calls "proactive AI" that will use historical customer information gathered from a current and from previous calls to not only conversationally respond to a visitor's request but also suggest other solutions that could result in up or cross-selling opportunities - all through chat, email, text messaging and Facebook Messenger, depending on the product purchased. The tool would also use that same data to make suggestions and actions agents could take to do their job better. The bot aims to replace, as much as possible, a human agent's interaction and would work around the clock and in multiple languages.

Although targeted at "fast growing" startups and larger enterprises, the application demonstrates how many organizations are now embracing chatbots as a way to improve their customer experience at a much lower cost.

Take my company for example: we have a chat tool that we use for our training and service platform but, because there's only ten of us, it goes offline after normal business hours here on the U.S. east coast. With an engagement tool like Bold360 we could keep our chat open 24/7 and rely on the application's ability to use our community's history of prior calls to respond to questions that come up - in different languages - and alert us when a human needs to get involved. In a short time, this tool would likely be a huge part of our sales and customer support process at a very low overhead.

We're already seeing bots like this in our engagement with larger companies. Many of us don't know that we're texting or emailing a non-human, nor do we care. Just as long as we're getting the information we need.

So where does CRM play into all of this? Everywhere. Because CRM is about engaging, responding to and helping your customers. That's why although Bold360 integrates with customer service platforms like Salesforce and Zendesk and provides programming tools to integrate with others. "We want to be the best system of engagement, not the best of everything," Paddy Srinivasan the company's general manager of its customer engagement and support solutions division [told BostInno](#) in 2017. "Automation is about to radically disrupt the space."

Chatbot Maker Ada Raises \$14M to Automate Your Customer Service

I often run across clients who have invested hundreds of thousands of dollars in complex CRM systems and are still not responding fast enough to customer questions, particularly when they're posed online. Sometimes, just a simple application is all that's needed.

Apparently, I'm not the only one who's suffered with this problem. Which is why a few significant investors such as New York-based VC firm FirstMark Capital as well as Leaders Fund, Burst Capital, Bessemer, Version One, and computer scientist Barney Pell plowed \$14 million into a Canadian startup called [Ada](#).

Ada has only been around for a couple of years, but the timing for their technology couldn't be better. Their product is a simple, customizable chat application for a website that, they claim, can be programmed by just about anyone to provide automated responses to common questions using their proprietary artificial intelligence algorithm. "People spend an average of 6 months of their lives on hold," their website says. "We're here to change that."

If your company is like mine, you commonly get the same questions about pricing, features and the benefits of your product online from your current or prospective customers. With Ada's chat tool you can now create an automated process for answering those questions with standard responses (including the ability to send photos, videos, and GIFs) and then alert a customer service person internally when a unique question is asked.

The application, most importantly, contains a programming interface (API) so that you can capture contact information from the website visitor asking the question and then bring that information into your CRM system for continued follow-up and nurturing.

Ada says it already helps its customers – including well-known companies like Career Builder, Coinbase and Shopify - automate up to 70 percent of their interactions, and saves them "millions of dollars" a year.

"Ada has delivered transformational, measurable results to some of the world's most innovative brands, helping them shift from a reactive, expensive support strategy to a proactive model that reduces customer effort," FirstMark Capital managing director Matt Turck [said in a company press release](#). "Ada has played an important role in driving automated customer experience, and we're confident in the team and the platform to surpass their rapid projected growth." Turck's firm has had successful investments in tech firms like Airbnb, Pinterest, DraftKings, Shopify, and Upwork.

Ada's not alone in creating AI-based chat solutions. You can expect to see the market for simplified automated chat applications explode over the next few years, led by companies like Ada, [DigitalGenius](#), [Conversica](#) and [LivePerson](#). According to a [recent report in VentureBeat](#), the chatbot market is about \$370 million currently and is estimated to grow to \$2 billion by 2024. Every great CRM system will need a great chat application and the best ones will automate as much as possible.

Why is a CRM Marketplace So Important? Ask Zendesk.

When I speak to people who are looking for a new customer relationship management system, I always encourage them to focus more on the company, not just the product. Of course, the actual software is important. But thanks to the cloud, today's mainstream software companies are watching each other closely and matching feature to feature with quick updates that can be timely released. Features are important. But what really sets a software product apart from its competitors is the company behind it.

How good is the CRM company? To answer that question, you have to consider a lot of factors. How many customers does the company have? What is its financial condition? How often is it introducing new capabilities? Who are the company's leaders? It's backers? And most importantly...how strong is the company's community?

To get an idea of a CRM company's community a prospective buyer should monitor their activities online, interview a few existing customers and maybe even consider attending a conference or two. But there's one other thing that sets apart the grownups from the children: the strength of the company's marketplace or as some call it, the app store.

Zendesk has learned this. A long-time provider of a great cloud-based service application, the company purchased CRM software Base in 2018 and is integrating it into its core offerings under the new name of Sell. Then Zendesk announced that it is launching a "marketplace."

Called the [Marketplace for Sell](#), the site is the home for third party developers, partners and other application providers to sell their wares, all which happen to integrate with Zendesk. You'll find add-ons from popular email marketing services like MailChimp, marketing tools like HubSpot and accounting connectors for QuickBooks and Freshbooks, not to mention storage support for Dropbox and Google Drive.

“Zendesk obviously has a very large community of independent developers, hundreds of them, who are [developing apps for] our support product, and now we have another product that they can support,” Matt Price, SVP and general manager at Zendesk [told Techcrunch](#). "The marketplace is...taking Sell from being a really great sales tool to being able to handle anything that you want to throw at it because it's extensible through apps.”

The marketplace for Zendesk's CRM app has a long way to go before it catches up with the more expansive community offerings from the likes of [Salesforce](#), [Zoho](#), [Microsoft Dynamics](#) and even accounting applications like [QuickBooks](#) and [Xero](#).

But it's an important start. And also, very important not only for its existing customer base but for any future prospective user. That's because good software companies have strong communities behind them. They realize that they can't do it all and therefore partner with other good software companies to provide links to their applications. Today's cloud based application tools make it easier for systems to speak to each other and other - like [Zapier](#) and [Workato](#) - are also readily available to connect applications where no third party product exists.

So how good is a CRM company? The answer is in its community. Which is why a marketplace – or an app store – is an important, if not fundamental consideration for any prospective customer comparing CRM solutions.

CRM BEST PRACTICES

Don't Use Your CRM System For Email Campaigns

The makers of most mainstream customer relationship management applications like to say that their products can also do email campaigns. They can. But they're really not very good at it. So my advice is not to listen to them. That's because CRM systems are generally lousy for e-mail marketing campaigns. And for three reasons.

Reason 1: There's a big difference between e-mail and e-mail campaigns.

The CRM systems we sell either have e-mail built in or integrate with popular e-mail services like Outlook/Exchange and Gmail. This is very helpful. When I send and receive my email I can do it right from within my CRM system and all the emails are stored in a contact's history, which can be shared with my team. I can create templates and setup workflows for automatic replies and routing. I can search through old emails and use that data for more outreach and engagement. This functionality increases my productivity and helps my team better serve our clients.

But when it comes to sending out more than a few hundred emails at a time - at most - I use an e-mail marketing platform like [Constant Contact](#), [Mailchimp](#), [Sendinblue](#), [AWeber](#) or any of a dozen other great services. Why? Because if I were to send out thousands of emails I will likely cause wrath with either my internet service provider or e-mail service provider. My emails will likely be flagged as spam by recipient systems, which are now smart enough to know when an email is coming from an unknown sender or server. My campaigns will be ineffective and I could be blacklisted. I will also have less useful tools and metrics that I can find in an email marketing campaign application.

Which brings me to Reason 2.

Reason 2: E-mail marketing services are better suited for e-mail campaigns.

The better e-mail platforms have tests. They monitor for potential spammers. They question customers who are sending out emails that fail their internal tests.

I admit that my own email marketing provider has shut me down on multiple times and forced me to answer questions about my marketing lists, my opt-in policies and my content. Believe it or not and even though this is inconvenient, I'm happy to play this game. Why?

It's because most email systems will recognize an email that is coming from a recognized, approved sender and will generally let those emails through to their recipients because they know their senders have been through some level of due diligence. Which is why your emails are more likely to get through to its recipients by using an email marketing campaign service then directly from your CRM system.

Those same e-mail service providers also offer templates, training, resources, testing and metrics for you to run your campaigns. And they all integrate with most mainstream CRM systems. So you can transfer those results to your CRM for further analysis and follow-up.

Reason 3: CRM applications differ from e-mail campaign management applications.

A CRM application is essentially a database with features wrapped around it. Your job is to make sure your data is as accurate and complete as possible. You can use the most reliable and common features of your system to manage contacts, activities, forecasts, opportunities and services. But marketing campaigns are more complex and need more specialized tools. Which is why when it comes to e-mail campaigns you should outsource that function to an application that's equipped with these tools. They'll do a better job.

These applications will do a better job than a CRM system because that's their only job: to make sure your emails get delivered to the intended recipients. Their entire business model is built around this objective.

The takeaway: don't use your e-mail marketing application as a CRM application. And don't use your CRM application for e-mail marketing. Both of these roles are distinct, complicated and specialized. So choose an application that does each one well and integrate them together. You'll find yourself getting a lot more bang for the buck...and much better marketing results.

How To Get People To Use Your CRM System

Customer Relationship Management systems are not accounting systems. CRM systems don't do billing, cash receipts, disbursements or payroll. If a CRM system isn't used, a company still continues to operate. If an accounting system isn't used, a company doesn't operate. This is why so many of my clients complain that the number one CRM challenge they have is actually getting people to use the system.

Here's how to fix it.

First, keep it simple.

Don't make your CRM database too complex. Cut down on the fields. Minimize the data entry. Scale back your complex sales and service processes. The less you're asking your people to do the easier it will be for them to do it. Think: what is the bare minimum of data needed to meet your objectives and go for that first. Maybe your users can evolve into doing more. But for now, keep it simple. You've got plenty of time to make it more complex if you have a long term outlook. But don't ask too much too soon.

Next, make it all about reports.

A CRM system is nothing but a database. And good databases have good analytics. Get rid of your spreadsheets and replace them with just a few key reports. Start with a simple pipeline report where every opportunity is tracked with details including sales potential, probability of close, projected close date, last action and next action. If your team meets and drives its activities around a weekly pipeline report you'll soon be able to see who's not getting data into the system...and address that issue. There are other good reports to consider. But focus on the pipeline first.

Only train the people who need the training.

My clients can be segregated into three groups: the CRM experts, the CRM users and the CRM dummies. Leave the experts alone, give a bit of help to your users and focus your training and support on the dummies. Because let's face it: there are some people that can pick up technologies and other people that can't plug in a TV set. But just because the dummies aren't good with technology doesn't mean that they're not great at their jobs.

Provide support, training and mentors for both the users and dummies. Assign your experts to mentor your users and dummies. Have an internal administrator (or two) who are responsible for the database and are your experts. Pay for their training and their support. Hire an outside partner that specializes in the system to support your administrator. Like most problems in business it's an 80/20 issue. Your usage problem will come down to the 20 percent of people who aren't using the system. Focus on them.

Finally, meet your people half-way.

We have one client that distributes deli meats. Their sales staff is pretty much made up of old men wearing hats and driving Buicks. Not exactly your tech demographic. But they're good salespeople, but they weren't exactly the power CRM user types, if you get my point.

So what did my client do? They met their people halfway. They setup a voicemail and asked their guys on the road to leave messages about their sales calls, appointments, notes and actions. Then they had a part time college kid enter that info into their CRM system. That's meeting people half way. And in the end, management got their reports, the sales people focused on selling and their database was always updated.

What I've learned about CRM implementations is that most companies bite off more than they can chew. They spend all this time designing complex systems that never get used. Most businesses – particular smaller companies – can barely share basic contact, calendar and email data, let alone be responsible for maintaining a database. To fix the usage problem and get your people adapting to your system just go slow, take small steps, have patience and follow my advice above. You'll be fine.

How To Make Sure Your Database Isn't A Mess

Customer Relationship Management (CRM) and other software vendors love to tout their features, functionality, automation, AI tools and analytics. Good for them. But in the end, and regardless what system you buy and what tools you use, it's just a database. And if the data is a mess, your system is worthless - both now and as a future sellable asset. So how to ensure that your CRM database has good, reliable, up-to-date, accurate and complete data? You need to do the following.

Hire an administrator.

For starters, you need to have an administrator in charge of your database. This doesn't have to be a database expert or an IT guru. It needs to be a smart power user who's tasked with ensuring that fields are completed, updated and current and that users are trained to enter the data correctly. That person is responsible for the completeness and accuracy of the data. They need to be expert in the system and have the support of outside consultants and the software vendor. If something is missing, incorrect or incomplete then it's that person's job to not only fix it, but implement the necessary controls to ensure that it doesn't happen again.

Keep it simple.

Next, keep your database simple. CRM vendors love to hype that you can create thousands of fields and countless screens and views. Don't do that. Your sales and customer service people - the primary users of your system - don't have the time to keep filling out all the information you'd love to have in a perfect world. It's not a perfect world. Settle for the key fields necessary to manage the customer's account. Limit your fields and screens. Make it easy to enter the data and then hold your users to this.

Setup up security controls.

And the way you hold your users to this is through security controls. When fields require data entry then make them required so a user can't move on to the next field or screen. Better yet, where possible incorporate drop down lists that automatically popup so users are forced to enter the data from the list. We live in a free country but that doesn't mean you should allow your users the freedom to enter anything they want anywhere they want. Sure, you can leave a few notes fields for lengthier descriptions. But your remaining fields should be nailed down with limited and required choices.

Limit access.

On that same note, not every user needs to see every field. The more fields and screens you allow your users to see, the more complex you're making your system, which violates the above "keep your database simple" rule. Create custom views that can only be accessed by certain users from certain user groups so that they don't have to worry - or get confused - with other screens that don't apply to them.

Leverage automation.

Next you want to leverage your system's automation tools. They used to be called Automated Processes. Now they're called Workflows. But soon they'll be called something to do with AI because AI is the latest buzzword to help sell products. Whatever. You should have alerts setup on key fields so that your administrator and the relevant user gets notified when a field is empty, has dubious data or hasn't been updated for a period of time. Your administrator should be notified when new customer records are created so that they can take a quick look at what was done to make sure everything is completed accurately. You should have fields that are reliant on other fields so that when a field is complete a related lookup list appears for a connected field.

Report.

Finally, you need regular and useful reports coming out of your system. Why? Because again, your CRM system is just a database and databases contain important data to help you run your business. Choose a few key reports - pipeline, open quotes, service calls, new leads - and make sure your management is not only receiving these reports but reviewing and acting on them. Once they see how useful this data is, the more they'll adapt to the new system. And when data is missing or incomplete then watch out! Those same managers will be barking at the users who aren't doing what they need to do so that they have the information needed to help run their group. Having good reports that are reviewed and relied upon by management is a self-correcting internal control for any database.

All of this takes time, commitment and planning. This is why it's important to involve a consultant or expert in your CRM system that can guide you through the process, or make the changes themselves if you don't have the time or inclination. After things are setup your administrator should be trained to carry the ball from there, so that they're well versed in making further adjustments, tweaks and changes to the system. If you can't do this, or are unwilling to commit to the time, money and effort involved then you're going to ultimately have a mess of a database. Which means your CRM system will ultimately fail. I know this. I've seen this. I've learned the hard way!

A Simple Way To Fix Your CRM Adoption Problem

You've spent thousands - tens of thousands! - on a customer relationship system and your people aren't using it. If that's your situation you can take some consolation that you're not alone. Many of my clients have the same problem. And user adoption is always ranked among the highest of concerns with CRM systems.

But the problem is solvable and here's a simple way to fix it: focus on reports. Get rid of your spreadsheets. Eliminate your email updates. Cut back on your weekly meetings. Stop filling out forms. Replace all of that with your CRM data. Emphasize the output and you'll find yourself getting the right input.

What kind of output? My best clients who get the highest level of adoption use reports as their weapon for doing so. The reports can be automatically generated and sent by email. Or in dashboards. Or retrieved on a mobile device. Or – old school – printed out and reviewed. Regardless, it's about the data. And these are the most popular reports that my best clients use.

The Pipeline Report

This is a report of all open opportunities. It shows the date created, contact information, potential value and the probability of closing the deal (rule of thumb: it's a 50 percent probability when a quote is issued, 90 percent when accepted - which allows for potential backouts - and 20 percent for when a prospect cools down and doesn't respond to your phone calls and emails). Also don't forget to include on your report what was done last (a meeting? An email sent?) and what's scheduled next to make sure everyone's on top of the opportunity and nothing's falling through the cracks.

The Activity Report

This report is used by sales and service managers as a way to look into the future, especially for under-performing employees. Where are they spending their time? How are they spending their time? What appointments are scheduled and with who? Are these prospects worth it? Are those customers significant? Are those activities generating more sales? More services? The information should come right from a user's calendar and task list and managers should be using the report as way to ensure that everyone's making the best use of their time.

The Lost Sales Report

This report is not fun because no one likes to talk about lost sales. But it's critical to understand where you're making your mistakes. As your users are generating pipeline opportunities they must close them out with a resolution - good or bad. Was the sale lost to a competitor? A pricing issue? Another product? Each month, my best clients grit their teeth, pour a shot of Jack Daniels, and go through this report to evaluate what went wrong so they can make things right going forward.

There are other popular reports my clients use such as tracking service issues, aging their quotes and proposals and evaluating close ratios of their salespeople. But the ones I mention above are the top three.

Notice one thing about the three reports? Your users are probably already doing the work, just in other places. I bet they're updating a spreadsheet of pipelines or sending emails about this stuff or maintaining their calendars. So you're probably not asking them to do too much more in order to get your reports.

And if you're using these reports to manage your team what is your reaction when data is missing, incorrect or incomplete? Where is the problem and with who? And how can that person's productivity (and profitability) be maximized by you if you don't have the data necessary to help?

When users aren't using the system, it shows when you look at the reports. And then appropriate steps can be taken be it flogging, paddling, a wedgie or maybe a simple reprimand. In the end, however, competent sales and service people know the value of this data. Maybe it takes a little TLC to show it to them. But once you do, and your team will soon understand that using their CRM data on a regular basis will motivate them to take more advantage of their CRM system.

What gets lost in the CRM hype is that, in the end, these systems are nothing more than glorified databases. And most businesses I know seem to lose sight of that. Focus on reports and you'll see adoption increase. I've seen it.

How Safe Is Your CRM Data?

Recently, one of the providers of a CRM platform that we sell issued an update to their terms of service. Here's what it said:

You agree that (the software company) shall, in no event, be liable for any consequential, incidental, indirect, special, punitive, or other loss or damage whatsoever or for loss of business profits, business interruption, computer failure, loss of business information, or other loss arising out of or caused by your use of or inability to use the service, even if (the software company) has been advised of the possibility of such damage. in no event shall (the software company's) entire liability to you in respect of any service, whether direct or indirect, exceed one thousand dollars (\$1000) or the fees paid by you during the twelve (12) months prior to the first event giving rise to such liability, whichever is higher.

You agree to indemnify and hold harmless (the software company), its officers, directors, employees, suppliers, and affiliates, from and against any losses, damages, fines and expenses (including attorney's fees and costs) arising out of or relating to any claims that you have used the Services in violation of another party's rights, in violation of any law, in violations of any provisions of the Agreement, or any other claim related to your use of the Services, except where such use is authorized by (the software).

Translation: the software company assumes zero responsibility for anything that happens to your data, regardless of whether or not it's their fault. That includes a data breach, a loss of data, a down server...whatever. And you, like me, probably just merrily clicked on the "accept" button - or in this case did nothing at all - which still legally binds you to the agreement. Feeling comfy? Yeah, I thought not.

Can a software company get away with this? Sure. They all do. Why? Because they can. That's one of the biggest problems with the cloud. The cost of switching from any of these cloud-based services, particularly after going through the pain and agony of implementing them is just too significant. And who are we going to switch to? Another platform with the same terms and conditions?

The big question is: what does your business do? It's not realistic to reject these terms and you don't have the attorneys to fight it. Your cloud data strategy – like all of your business strategies – should be about measuring your risks and preparing for the worst.

In this situation, when it comes to risks, there are really just three. The first is that your data gets hacked or breached or subject to malware or ransomware. The second risk is that your data simply disappears or becomes inaccessible. The third risk is that your software company disappears, along with your data.

The good news is that the risk of any of this happening is remote. Why? Because CRM software providers, like any cloud platforms, have built their business models around delivering data to their customers. They invest millions - billions altogether - in the best security resources and people who are likely much smarter than the typical IT firm that's servicing your business.

Many of these platforms are already hosted by Amazon Web Services, Google or Microsoft Azure, where the data and security controls are even more advanced. CRM cloud providers – like all good companies - avoid public relations disasters and know that if they can't provide the data their customers need in a secure manner they'll be out of business. The reality is that security and data integrity is more important to these firms than the actual features of the software.

So the risks are relatively low. But that doesn't mean you're data is completely safe. So you have to prepare.

You can back up your database. Most CRM platforms will provide their users with backup data and usually for an additional fee. Once you get that data you can then back it up to a separate resource using online backup software like [Carbonite](#) or [Barracuda](#). Usually, this data is in a format that can be imported to another system, although it won't be easy, fun or inexpensive.

You can make sure your employees - particularly your work from home employees - are trained, have security software installed, are connecting to secure routers and are using the most recent operating systems. To do this you'll likely have to employ an outside IT firm to monitor their activities and make sure they're setup the right way. It's a cost, but it will help minimize your risks and this is now a reality is today's post-pandemic remote working world.

Cyber Insurance won't stop any of this from happening. But it will provide funds if your business is interrupted because of a breach. Liability insurance could cover you if your customers sue you because your data got breached. Talk to your insurance provider and make sure you have the appropriate coverage to minimize your financial risks.

Unfortunately, if your CRM provider goes down and you can't access your data you're going to have twiddle your thumbs until their systems are restored. This is happened to my firm and our clients on numerous occasions. It's maddening, but usually gets resolved in a few hours. Regardless, make sure you're prepared for this potential problem by having manual procedures in place.

And what if your CRM provider goes out of business or disappears into the night? I wouldn't worry too much about that. Unless you're using a very obscure system, your CRM vendor wouldn't likely just shut its doors. They'd sell to a bigger company or a competitor. Which means that your data will be inherited by someone else with the intention of keeping things going, albeit you may be facing a migration to a new system in the future.

So is your CRM data safe? Yes. No. Pretty much. Know your risks and prepare for the worst.

Why Most CRM Partner Programs Are Terrible

Oh no, I just got word of yet another "big" change to another of the partner programs from a CRM vendor we work with. I'm not going to name the CRM vendor. But I can tell you this: you've heard of them. My company is a "partner" for a few CRM vendors.

And when it comes to partner programs, we've seen it all. Over the past 25 years we've been introduced to "exciting" changes, "new" developments and "innovative" ideas. We've also been warned about our sales levels that don't meet their arbitrarily defined minimums, buried in oftentimes useless certification requirements and subject to a revolving door of channel managers who arrive at their jobs all jacked up to change the world and then leave months later in a state of despair.

At this point, I'm ambivalent when it comes to "partner" programs. I don't get worked up when changes are announced. I don't get "excited" when new offers are introduced or when new channel managers come on board. It's not exciting. It's just another headache. So, I just keep my head down and continue working. That's because most CRM partner programs are terrible.

They're terrible because the CRM vendor goes into it with the wrong expectation. Sorry, but your partners aren't going to provide you with leads. We're not the magic-silver-bullet-answer to your sales challenges. We can help in the sales process but let's be real: we're better utilized when we're brought in to keep your customers happy and help you nurture new ones. You're the big software vendor. You've got all the marketing money. You've got the sales resources. But we're the guys with our feet on the ground that's closest to the customer. It's our job to service these people and we can do that job better than you because we're closer to the project than you are. So, to that end stop paying us commissions on new sales. Instead, pay us commissions when our mutual customers renew their subscriptions. Make it easy for customers to align themselves with a partner and encourage each customer to have one. Also make it easy for a customer to change partners if they're not happy with theirs. It's up to us, the partners, to do what's right for the customer and if we're not doing the job then it's on us if we lose them. But you, the software vendor, shouldn't lose the customer because of our incompetence. Let a better, more competent partner do the work.

As a software vendor, you can do a few other things to improve your partner channel. You can raise the bar on certifications. Make them more relevant, harder to achieve and more technical. This way you separate the men from the boys and you improve the quality of the people you're relying on to service your end users. When you do this, make sure your customers know about these certifications so that they can choose who's best qualified to service their project.

Stop with the reporting. Don't waste money on systems that require us, as partners, to update you on leads and activities. Again, we're not your salespeople. The only metric you should care about is our mutual customers' satisfaction and renewals. Everything else is irrelevant.

Support us. I tell our clients that, if hired as their partner, we can best liaise with the software vendor on their behalf if any problems come up. For the most part that's true. Your job as the vendor is to make it as easy as possible for me, the partner, to get answers for our customers.

You want to prioritize our calls and emails because we're not going to waste your time and know what we're talking about. We also don't want to talk to you but if we are it must mean it's serious enough to warrant an investment in our time. You should be investing the same. Web and self-service help are fine. But have a quick way for me to get hold of a live person too. If I'm calling it's probably a complicated question enough to warrant speaking to a support rep, not a chatbot.

Share your tools. Don't make us buy licenses or restrict what we can use. We're your partners, for God's sake. Let us use your software like you do so we can test and demonstrate and figure things out on behalf of our clients, your customers.

Would You Rather Clean Your Bathroom or Update Your CRM System? Guess What a Study Found!

I want to be clear that I enjoy cleaning our bathrooms. To me, there's a certain satisfaction in the scrubbing of toilets, the polishing of sinks and the mopping of a floor, let alone that distinct and somewhat comforting disinfectant smell (I like Pine-Sol). But as much as I enjoy the act of cleaning, I don't make a living doing that. I make a living implementing customer relationship management systems. Maybe I should reconsider what I do.

Why? Because a [study](#) from research firm Beagle Research in partnership with Oracle is telling me so. The study, which surveyed over 500 line of business employees with primary responsibilities of selling to new accounts via digital tools in the business to business space, revealed something very disturbing for CRM implementers like myself. Apparently, a great majority of these people would rather clean their bathrooms rather than update their CRM systems.

66 percent of them as a matter of fact!

And the complaints get even worse. 90 percent of the survey's respondents complained that the extra time it takes to enter data, work on multiple applications and endure training meant that their CRM systems actually made their jobs harder. Others are frustrated with tasks that could be automated, as well as the amount of time it takes to update their databases and re-enter mail or calendar data into multiple places. In the end, those 66 percenters said they would not only prefer to clean their bathrooms over upgrading their CRM systems, but also stand in line at the DMV, get stuck in traffic, do jury duty or even...now hold on a minute...visit the dentist. The dentist!

"Our research has shown that outdated CRM systems are not only impacting sellers' productivity, but are also impacting the overall financial performance of organizations," Denis Pombriant, managing principal, Beagle Research, Inc. said in a statement. "The CRM systems that are widely used today are simply not adequate."

I disagree. Today's CRM systems are not inadequate. It's just the way they're implemented. There are literally hundreds of potential CRM applications on the market today and a few dozen which I would call leaders overall. When I speak to prospective clients, I'm never short of alternatives to offer. And here's the fact: in today's cloud-based world where CRM vendors can watch and quickly copy each other, the features and functionality of most of the mainstream products are quite satisfactory.

The problem isn't with the applications. It's that these systems are set up the wrong way. That due to two reasons.

The first is that many companies - particularly smaller companies - think they can implement a CRM system on their own. They can't. Sure, they can follow the instructions, watch some videos and lean on a vendor's support. But for the most part those vendors don't truly know their customers and those customers usually have little experience with CRM systems and what they can do. They don't know the right way to set them up. They're not fully aware of all the features that they can be using - and even just as importantly - ignoring. They skimp on training and don't invest in internal resources.

In the end, they shoot themselves in the foot and wind up with nothing more than a glorified rolodex. Of the 600 clients my company serves I would estimate that maybe 20 percent are using their CRM systems to their fullest capabilities. The remainder are unwilling to simply try harder.

The CRM vendors are also to blame. They make it seem as if a customer can just push a button and, like a wizard at Hogwarts, sales will magically appear! They dupe their customers into thinking that these systems are so easy to use that anyone can be successful, regardless of the time and investment needed and the internal culture required to really leverage a CRM's power. They also avoid sharing revenues – even simple customer leads - with their channel partners and consultants because they're greedy and this greed ultimately hurts their end user customers.

So, what happens? A poorly implemented CRM system that results in users literally preferring to clean their bathrooms or go to the dentist rather than using it. And that's a shame. Because when a CRM system is implemented the right way it can significant impact a company's productivity and profits. But hey, if you prefer to clean a bathroom rather than making this investment go for it. I've got plenty of Pine-Sol available if you'd like to borrow.

Why Are So Many CRM Users Dissatisfied with Artificial Intelligence?

We've been hearing a lot about artificial intelligence - AI - particularly when it comes to customer relationship management. Just do a quick Google search of AI and CRM and you'll see countless companies in the space announcing new tools, features and services leveraging AI to - as so many claim - increase productivity, grow sales and improve customer retention.

It all sounds great, but unfortunately no one seems to be taking notice.

That's according to a [survey](#) from small business CRM provider Freshworks. The report - which compiled responses from more than 500 CRM users - found that only 12 percent of them actually use a specific AI-based tool, and only 11 percent say AI in their CRM allows them to focus on high-value customers. Sadly, almost three in four CRM users (73 percent) say that AI has yet to deliver on its transformative promise for business operations, only one in three CRM users (36 percent) can say AI is a strong value for the money and nearly all CRM users think AI is either too expensive (97 percent) or isn't extremely useful (89 percent).

"AI offers an opportunity to transform customer support, engagement and, ultimately, success," said veteran tech/equities analyst Fred McClimans of Futurum Research. "But, as confirmed by the recent Freshworks study, despite aggressive hype by many CRM providers, we're not seeing the widespread user awareness, adoption or satisfaction we'd expect."

Yikes. That's not good is it? Seems like most CRM users aren't yet thrilled by AI. So is artificial intelligence a bust? A scam? Overhyped? Not at all.

This is not going to last. What we're seeing right now is people's responses to a brand-new technology that will likely have a significant impact on their business. It's a technology that takes time to learn and think about how it will be used. It's also a technology that will be extremely disruptive. In many cases AI will change how our employees are doing their jobs. It will result in some workers losing their jobs. That's just a fact.

But here's another fact: my clients who best use their CRM systems will be leveraging AI in the future and the best CRM companies - from [Freshworks](#) to [Salesforce](#) - will continuously be providing more intuitive, faster, and powerful AI tools for their customers. It's a natural evolution in CRM and I don't think anyone in the industry is surprised at the initial tentativeness from users. This evolution will take time and as AI tech evolves over the next few years, CRM systems will become more essential for all companies, big and small.

Just you wait.

Should You, or Should You Not Turn on Your Camera for That Zoom Meeting?

If you're in sales, marketing, communications or service you're likely using a customer relationship management system. But now that you're working from home more often you probably have another tool that's frequently alongside it: Zoom.

You're using Zoom – or a similar video conferencing system - for just about every meeting now. But maybe you have the same question that I have: are you expected to turn on your video camera? Is it rude if you don't? What's the etiquette? What's the right answer?

Zoom - and its competitors like Microsoft Teams, GoToMeeting, Google Hangouts Meet and others - isn't new. Most companies have already been using at least one of these tools long before their employees were forced to work from home as a result of the pandemic. Over the past few years, whenever I was invited to a conference call with a corporate client the invite usually came from one of these popular applications. Did I ever participate with video? Never!

I never gave it much thought. I like to walk around while I talk on the phone and not be forced to sit in front of my laptop. More to the point, I frequently look like a slob and don't want others to see that. I'm not used to doing video. And besides, it's just a conference call, right? These people aren't seriously using video too, are they?

Turns out, they are.

Significantly more people have been leaning on these video conferencing services over the past few weeks. For some reason – maybe out of curiosity or boredom – I recently decided to start taking my conference calls via my laptop with my video cam turned off thank you very much. Turns out, on call after call, I was the ONLY one not showing my face! Everyone else was there, chatting away and on video. They were comfortable. Some had fun backgrounds. Some were in their living rooms. Others were comfortable doing other work and occasionally glancing up. But no one seemed to have a problem being on camera...except me! My square was a big, fat blank. And you know what? It looked...rude. Like who the heck was this guy, not participating on video like the rest of us?

It suddenly dawned on me that by resisting Zoom I may be hurting sales. I asked a few of my clients whether or not they use video on Zoom calls and almost all said they did. A few admitted that they aren't crazy about it and shared some of my apprehensions. But I found that many of them actually enjoyed it.

As a sales person, the lesson was clear: in 2020 video calls are not only encouraged, but quickly becoming required. If your job revolves around a CRM system like me then you're probably doing a fair share of calls during the day. It's now time for us all to step up and start doing these via video, whether we use Zoom or other applications. Yes, it means putting on a clean shirt and brushing your hair (not that I have to worry about that).

But you know what? I'm convinced that doing so will help us close more deals and connect to our customers better. We get to see people's faces and better interpret their reactions. We can look in their eyes - even over a screen - and have a clearer understanding of the meaning behind their words. Oh, and we may get a glimpse into their personal lives that might trigger a conversation which could create a deeper relationship ("you're into origami too?") based on common connections.

I'm sure anyone under the age of 35 reading this will say "duh." OK, I admit I deserve that. But of the many ways that the Coronavirus will impact our workplace models, the use of video conferencing will become not only normal, but expected. Because of this shift, I also expect that future iterations of CRM applications will either incorporate their own video conferencing features (some already do) or easily integrate with the more popular platforms.

So, should you or should you not turn on your camera for that Zoom meeting? The answer is that you should. I know I will be.

We Suck at CRM and Forecasting but There's Hope According to a New Miller Heiman Study

Are you looking to invest in a new CRM system and you're concerned about whether or not it's worth it? Or maybe you're struggling with the one you already have. Don't worry - your concerns are justified. Plenty of others are having the same challenges. But, according to a new study, there is hope.

The Sales Operations Optimization Study released by CSO Insights - the research arm of sales consulting giant Miller Heiman - looked at 300 companies of all sizes to determine the effectiveness of their sales operations. Here's what I learned from reading the study.

Having a "sales force" today is not enough. Today's growing company needs a "sales operation" that includes not just sales people but administrative support and management. According to the study, it's a "strategic function designed to provide a platform for sales productivity and performance by providing integrated methods, processes, tools, technologies and analytics for the entire sales force and senior executives." In English: your sales people can't do it all. They need a team.

Unfortunately, most smaller companies still don't have a sales operation. The study found that most companies (about 64 percent) have a sales operation in place and the number is as much as 80 percent for companies with more than \$250 million in revenues. But only 37.3 percent of smaller companies - those with less than \$10 million in revenues - had a sales operation. Companies that provide more support and supervision to their sales people simply close more deals.

Sales and marketing continue to have a disconnect. 74 percent of organizations say that sales and marketing people in their companies still do not share a common definition of a lead. We suck at forecasting. Almost half of respondents (45.7 percent) used a "subjective or casual approach" to forecasting. It's not as if this isn't a known problem. In fact, most companies surveyed agreed that improving their sales forecasting is one of their top three activities that needs improvement in the next two years. Unfortunately, it just seems like we continue to exercise the same bad habits: too much subjectivity, relying on the salesperson's anecdotal evidence, lack of investigation from management, bad data and a tendency to look back instead of forward. The good news is that when companies do implement a more formal forecasting process their results get better.

We also suck with our CRM systems. Although almost all the participants said they had a CRM system, 32 percent of them admitted that their systems are less than three-quarters adopted. Only

24.9 percent of users said they have high confidence in their CRM system's data and only 25.2 percent said their CRM actually enhanced their productivity.

But there's good news for CRM. When companies adopted at least 75 percent of their CRM system's capabilities and combined the system with a formal sales process there was "notable improvement in win rates and quota attainment."

So, what's the takeaway? Like life, you get out of things what you put into them. If you're implementing a CRM system and expect, with a snap of your fingers, to see great results immediately you're going to be disappointed. To succeed, today's CRM systems need to be an integral part of a sales operation and supported by formal processes and a sound forecasting methodology. Otherwise, why invest in a powerful tool if you're not willing to put the appropriate resources behind it, right?

When It Comes to CRM's Core Problem, Marissa Mayer's New Venture Nails It

Former Yahoo CEO Marissa Mayer has a new company called Sunshine that aims to make people and small organizations more productive. She's doing that first by focusing on a very simple thing that goes to the very core of customer relationship management: an organization's contacts.

"We're creating technology to address practical, everyday pain points in the basic, foundational tools that connect us with the people we care about," Mayer and her co-founder Enrique Munoz Torres wrote on the company's [website](#). "Ultimately, Sunshine will remove complexity in things like contact management, scheduling, event organization, and group communication so you can spend time more meaningfully."

Mayer's company, according to the [Mountain View Voice](#), was founded in 2018 and has since raised \$20 million in its first round of funding from investors, including Menlo Park-based venture capital firms Felicis Ventures and Unusual Ventures, as well as from Mayer.

It's first application, Sunshine Contacts, promises to leverage the power of artificial intelligence to help users more easily find and better organize contacts as well as eliminating duplicates and keeping contact information up to date. Data will be pulled and synchronized from LinkedIn, Apple and Google contacts as well as other online address books and stored into one central location. More importantly, the app will display recent email correspondence.

Sounds simple, right? Don't I wish.

My small and medium sized clients often come to me demanding CRM, CRM, CRM. And yet, when we start digging into their situation, we don't find a need for CRM. We usually find a different need: contact management.

Workgroups with as few as five or ten people oftentimes struggle to maintain a solid, accurate and complete database of an organization's contacts. Fields are often left empty or not updated. Contact information is kept in multiple places and not synchronized. Simple activities such as appointments, notes and email communications are not shared within the workgroup.

Contacts are the very core of a CRM database. We all know that the value of a database is the actual data it contains. So, when the most basic contact data isn't accurate, how can we rely on it for sales, marketing and other CRM functions? We can't.

Which is why Mayer's new venture nails it. "When your contacts are organized and truly work, they create a flywheel where scheduling, planning, organizing, and being thoughtful about your

relationships becomes infinitely easier," she says. "When your contacts are complete, comprehensive, and accurately reflect relationships, you can spend your time building meaningful connections and shared experiences."

I realize that Sunshine is taking a more consumer-focused approach regarding contacts (Mayer said in a recent [Wired interview](#) that her goal is to "build a suite of products, each aimed at addressing "smart, small-scale sharing" in areas like photo sharing or event scheduling"). But it's very relevant to organizations and particularly for small business who wants to succeed with CRM. The first step is to succeed with contact management.

Just as a good high school education provides the foundation for a successful college experience, so does an accurate database of contacts provide the foundation for a successful CRM experience. Get contact management in your company right. Then you're ready to move on to the next level.

It's not as simple as it sounds.

MICROSOFT

5 Reasons to Buy Microsoft Dynamics 365 - Sales

At The Marks Group, we sell and implement five Customer Relationship Management (CRM) applications and currently serve more than 600 companies who use these applications to increase their sales, improve customer service and grow their profitability. A good CRM system, when implemented properly, will ensure that important tasks are never falling through the cracks, critical information is being shared by everyone in your organization wherever they are and the value of your company is increasing.

Microsoft has Dynamics products for service and marketing and there's also a scaled-down sales version called Outlook Customer Manager which you can purchase as part of the Microsoft Office 365 Business Edition. The Marks Group supports and implements all of these products. But this whitepaper is about the sales version of its Dynamics 365 product line called Microsoft Dynamics 365 – Sales. That means managing contacts, accounts, opportunities, quotes, forecasts and all the other interactions that goes along with building a great sales team. Like the millions who already use this great product, it may be right for your company. If you're seriously considering Dynamics 365 - Sales then let me share these five reasons why you should consider buying it, based on the more than 90 clients we serve who have already purchased it.

1 – There is deep integration with Microsoft Outlook

This is kind of a no-brainer. There are more than 100 million Outlook users in the world and many of them are committed to the product for both email and activity management. A huge attraction for Dynamics 365 – Sales is that it not only can be accessed through any browser, but it's built right inside of Outlook too. No synchronization, importing or exporting. The folders for all of your entities are right there in Outlook and buttons are added to existing ribbons for users to quickly connect activities, contacts and emails right to the shared database. The learning curve for people already using Outlook is much less steep than teaching them to use another system, so training and adoption is quicker.

2 – You already use Microsoft products

Oftentimes we meet companies that are already deep into other Microsoft applications. For example, your entire financial system may be in Dynamics – GP, or you have a very active document management system based in SharePoint. Perhaps you've created databases in SQL Server or use Office 365 applications like OneNote, Word or Skype. When you get Dynamics 365 – Sales you don't have to worry about integrating with these products because it's already been done. And if you're already ensconced in a Microsoft platform with Microsoft-trained technical staff on your payroll you'll make quick friends by going with a product which uses a

data and code base that is familiar to them.

3 – Your company needs scalability and significant customizations

Although Dynamics 365 – Sales can and is used by many of our small (5-10 user) clients, it's also positioned to compete against the big players like Salesforce, Sage, SAP and Oracle. If you've got an IT staff or development team that's looking to create a larger, more complex platform that integrates with various other systems and your database then you're giving yourself the most options with Dynamics 365 – Sales because it's very suitable for enterprises. With this product you'll be able to design more complex workflows and processes, develop custom solutions and draw on the expertise of Microsoft's huge community of developers and partners.

4 – You want something offline

Most cloud-based applications are just that: cloud only. Microsoft offers more choice. You can get Dynamics 365 to use in the cloud...or you can buy it and install it on-premise. It's more expensive to buy it outright (although potentially less expensive over time). It requires more in-house hardware and infrastructure. You'll have to subscribe to maintenance to get updates. But then it's all yours and its in-house. Plus, you can set it up on your VPN or hosted network to access anywhere. Even if you don't want to buy the full-blown on-premise version of Dynamics 365 –Sales you can still synchronize your work to an offline Outlook database for use when web access is spotty.

5 – You want automation

Under the company's new leadership, Microsoft has committed to being a leading player in the development of artificial intelligence and automation using bot technology and sees the expansion of this technology most through its business applications like Dynamics 365 – Sales. With the company's vast resources stated objective to help people work better using cloud and mobile, look for many new offerings that will enhance this product over the years to come. Some companies resist change and have a more conservative approach to their business and if that's your culture Dynamics 365 – Sales is fine. But if you're looking to set yourself apart from others and want to use the latest automation software to grow revenues and improve your sales processes over the next few years you won't find a more innovative platform than this one.

The Bottom Line

We recommend Dynamics 365 – Sales to companies with these characteristics:

- Outlook is the company's primary email application
- Other Microsoft applications and technologies are extensively used

- The company has a Microsoft-trained staff or a close relationship to a Microsoft partner
- The company will be quickly growing and requiring scalability and customizations
- The company is open to significant automation

If these characteristics fit your description, then Dynamics 365 - Sales may be the right choice for you.

Why Did Microsoft, Amazon and Salesforce Invest in This CRM Company?

It's not every day that large competitors become investors in the same company. Last year however, one CRM company attracted funding in a Series C round from four of the biggest: Microsoft, Amazon, Salesforce and Comcast.

The venture capital arms of those tech giants - as well as a few other well-known VC investors like Accel Partners and Redpoint Ventures, plowed \$27 million into UK-based Tact.ai, bringing the start-up's total amount of capital raised to \$53 million, according to [this report on TechCrunch](#).

What's so special about Tact.ai? Two words: voice recognition. The company's technology uses artificial intelligence to solve a CRM headache that many of my clients consistently complain about: getting their sales people to use the system!

With voice-enabled technology, sales people can talk to their devices in the field and ask their CRM systems everything from sales history and email communications about a customer to providing more information about products, orders and preferences while on the go, in their car or just sitting in a conference room.

Tact.ai is designed to be a sales person's personal assistant who's on call 24/7. It automatically pushes deal and customer insights to the rep's device and recommends the best next actions. Its powerful voice features are capable of quickly switching conversations and knowing a user's personal preferences as well as promising to let salespeople carry on conversations and figure out solutions with it that aren't necessarily linear or set to a specific script. And it will ultimately sync with powerful CRM systems provide by Microsoft and Salesforce while running on cloud platforms like Amazon Web Services. (Author's note: my company, the Marks Group PC, is a Microsoft Partner).

“Sales professionals need a way to control their data and coordinate with people, whether on a phone, smart speaker, or in-car,” Tact.ai founder and CEO Chuck Ganapathi [said in a press release](#). “We’re pleased to work with world-class investors and global companies like Comcast, Amazon, and Salesforce.com to execute on our vision of a conversational and voice-driven enterprise for sales teams.”

It's no secret that Amazon, Microsoft and other large tech companies are investing heavily in voice automation technologies. Most of the attention, however, has been focused on consumer driven devices powered by technologies like Alexa and Cortana.

But, behind the scenes, big steps are being taken to use this technology to help companies better automate their sales and customer service processes. “Just as people were quick to adopt voice technology in the home, we see an enormous opportunity for voice services in the enterprise,” Paul Bernard, the Director of Amazon’s Alexa Fund said in the TechCrunch report. Amazon is rapidly investing in applications that will run on its Alexa for Business platform.

CRM is all about managing relationships with people – customers, prospects, partners and suppliers, which makes it the natural next step for voice-automated technologies like the ones provided by Tact.ai and others in the space. These applications, as they mature, will help sales and service people better use their CRM systems to conversationally complete tasks, manage deals, interact with customers and collaborate with others in their company.

Adobe Plus LinkedIn Plus Microsoft Could Be a Killer Combo for Marketers, Big and Small

Once upon a time, Adobe made Flash and a popular PDF converter and of course Photoshop - that great desktop software for publishers and graphic designers. But times have certainly changed. Over the past few years, the company has leveraged its core offerings and morphed them into a number of powerful marketing tools that encompass videos, 3-D illustrations and powerful graphics.

So, what to do with all this great looking stuff? Enter Microsoft. And LinkedIn.

According to an [announcement](#) the companies made at an Adobe Summit, the company is partnering with Microsoft and LinkedIn (which is owned by Microsoft) to offer a one-stop-shop lead generation solution.

Here's how it works.

You create a great looking advertisement using Adobe's software which includes tools for making videos, editing photos or designing your own art and illustrations. Adobe - which will be using the profiling tools it purchased from Marketo (a business-to-business marketing software acquired last year) - will then leverage LinkedIn's data to target your advertisement to specific people based on their demographics, history, professional titles and interest. When someone raises their hand or wants more information, the data is then moved into the CRM modules of Microsoft Dynamics where your sales people nurture, follow-up and hopefully close.

"The LinkedIn network is one of those clear holy grails for business marketers," Steve Lucas, senior vice president of digital experience at Adobe and former chief executive officer of Marketo [told Reuters](#). "It has just become such a huge lever for B-to-B marketers that it would be impossible for us to ignore it."

This type of integration is a long time coming. Microsoft completed its acquisition of LinkedIn in 2016 and since then its Dynamics and Office customers have been offered – in my opinion - a frustratingly few options for leveraging the powerful professional data that LinkedIn contains. I get that one of the biggest reasons why is not to over-exploit the LinkedIn database, which - if barraged by too many uninvited marketing campaigns - could drive members away and decrease its value. Regardless, many of my Dynamics clients have wanted more access to the LinkedIn treasure trove. Now they can have it.

Think about this: you want to target your HVAC product to mechanical engineers. You design a killer ad. Now you target the engineer – and her connections – in LinkedIn. Is this intrusive? I

don't think so. If professionally done, why wouldn't a community of mechanical engineers on LinkedIn appreciate getting good information about products that help them do their jobs? Adobe will make sure the information looks great and is targeted towards the right audience. Microsoft Dynamics will ensure that once someone has expressed an interest there's always another task for follow-up. And according to Kareem Anderson, a blogger who follows Microsoft, there's certainly no shortage of consultants out there who would be willing to help. "A cursory view of resumes and skills listed in (LinkedIn's) profiles seem to overwhelmingly include intersections of Office and Adobe experts," he [wrote](#).

I cannot imagine why my Microsoft customers - both big and small - wouldn't want to take advantage of these offerings. And I also bet the people at Salesforce are thinking – and worrying about - the same thing.

Microsoft Deepens its Dip into LinkedIn's Data...But Not Too Far.

During its recent Business Applications Summit in Atlanta, Microsoft executives announced a bunch of new changes coming for its Dynamics 365 business applications which will part of its Wave 2 this fall and for the six or so months after.

According to [Venture Beat](#), there will be more artificial intelligence, fraud protection, mixed reality integrations, better analytics, improved natural-language searching and even the introduction of block chain tools. But for users of the company's CRM offerings, particularly its Dynamics 365 for Sales application, the company's many new features and enhancements will also provide its users something that they've been demanding for a long time: more access to LinkedIn.

As you probably know, Microsoft purchased the social media platform back in 2016 and has been promising its integration with the company's Dynamics 365 business applications. The potential opportunities to leverage this information is enticing. LinkedIn is used by most working professionals and includes a wealth of data about their backgrounds, preferences, reading habits, interests and - most importantly - their connections throughout their business worlds. The potential of getting access to this treasure trove and then being able to use it to build relationships makes any sales or marketing person lick their chops.

Well, get ready to lick your chops.

Building off of some of its initial integrations, Microsoft's planned enhancements between the LinkedIn Sales Navigator and Dynamics 365 for Sales (called the Microsoft Relationship Sales solution) promises to "empower sellers to drive more personalized and meaningful engagements with buyers." Sounds good, but how?

For one thing Dynamics 365 for Sales users will be able to more easily send LinkedIn InMails to contacts, leads and other entities right from their Microsoft application while the LinkedIn data is viewed in real time alongside. For those organizations using the application's Unified Interface – a common user interface across most devices – InMails from LinkedIn that are sent will be automatically added back into Dynamics for Sales as a past activity for a contact, opportunity, lead or account.

Also, Unified Interface users will be able to stay up to date when their contacts in LinkedIn move around. When the synchronization setting is turned on, users will be notified of job changes of all their owned contacts that are posted on LinkedIn and then contact information can be automatically updated back in Dynamics 365 for Sales. Changes from LinkedIn can also - in some cases - be used to trigger workflows and other automation.

All of this is great stuff. But unfortunately, Microsoft is still keeping the holy grail of LinkedIn's true power from its users: the ability to dig into its database for marketing. It's not that they can't do this because they can. The understandable reason is that turning LinkedIn into nothing more than a purchased database for spammy emails by anyone with a Dynamics 365 would quickly lead to a mass migration of LinkedIn members to something less annoying. As an active user of the social media service I would probably be the first in line to abandon it if that were to occur.

So, for now, Dynamics 365 customers will have to settle for better email integration and synching of contact data with LinkedIn. Although I'd love to see more, I wouldn't hold your breath. Microsoft is trying to figure out how to best leverage LinkedIn's value without...well...destroying LinkedIn's value.

Microsoft Changes its Dynamics 365 Pricing. Again.

My company implements Microsoft products. But, compared to the other CRM applications we implement, Microsoft Dynamics has been the toughest one to sell.

Is it because of the features of its CRM modules? Absolutely not. Dynamics 365 is excellent. It's an extremely customizable application that integrates well with other Microsoft (and third party) technologies and provides our clients using it with a fast and effective way to manage their sales, marketing and service activities.

But unfortunately, the sales and marketing teams at Microsoft over the past few years have been sabotaging the best efforts of their developers. Dynamics 365 really is a great product to sell, but the pricing and messaging scenarios are so complicated – and have changed so often - that we, and other partners I know, have had a very difficult time explaining (yet alone recommending) the best configurations for our clients, particular our small and medium sized customers.

Maybe it's because we're just not smart enough to understand it all. But I don't think that's the case. I won't go into all the ups and downs in the pricing, branding, naming and communications that has rained down on us from Redmond over the past decade. We're just battle weary. Even when we start to get our arms around Microsoft's messaging, the message gets changed. And now it's happening again. Ready?

Currently, if you want to get Dynamics' CRM modules you can do so under their "Customer Engagement Plan" where you pay \$115 per user per month and if you want the ERP (finance) applications that's \$190 per user per month. Combined, you can pay \$210 per user per month. That's changing. The company has decided to move away from the "plan model" to an "a la carte model."

Mary Jo Foley at ZDNet [sums it up nicely](#). Effective October 1, users can now get the Customer Engagement modules by signing up for a base license of \$95 per user per month and then pay an additional \$20 per user a month to "attach" more licenses for the modules they want. Microsoft will allow customers to add two apps (for example sales and marketing) for just \$20 per user per month but any apps after (for example field service or project service) would be charged an additional \$20 per user per month. So as not to confuse you further, I'll ignore the ERP pricing going forward because this column focuses just on CRM.

Why is Microsoft doing this? The company says it's to provide more value. But according to Jason Gumpert at [MSDynamicsWorld](#) it seems to me that the company is more concerned about...Microsoft. Gumpert, by sharing slides from a recent Microsoft conference, reports that 80 percent of its Dynamics 365 users are only using a single app and they're "paying less for the

plan (than) they would if they were buying a single app that they really use." Also, Microsoft is concerned that its current pricing prevents "monetization of future enhancements." After the smoke clears, some customers may see as much as a ten percent increase in their pricing, and that's even according to Microsoft.

Maybe this is a simpler, value-based approach for some. Maybe not for others. Look, I'm just trying to keep up and explain these things to our clients!

So, here's what I do expect: more questions from customers. More head scratching as they try to figure out slides [like this](#). More wrong answers from Microsoft employees, partners and distributors that are, as in the past, not up to speed on these changes and just as confused as the rest of us. And – given history – more modifications to come when the team that came up with this new pricing model inevitably leaves their jobs and is replaced by yet another team that wants to change the world.

My advice to Microsoft: please stop. You've rebranded, renamed and repriced Dynamics to death. You've got a new pricing plan so fine. Just nail it down and stick with it for...oh...five years? Do I dare to say seven? Give your community a chance to catch up. Otherwise, my prospective clients will just move to other CRM products where the features are just as good and the pricing is easier to understand and doesn't change with the next moon.

Dynamics 365 is really excellent. But when it comes to these never-ending changes, the really smart people at Microsoft are just outsmarting themselves.

Is Microsoft Too Late to Retail?

When you think of retail technology a few well-known names come to mind: Amazon. Shopify. PayPal. Square. But what about Microsoft?

Microsoft of course provides a lot of the back end infrastructure that helps power many retail systems. But the company's Dynamics 365 retail product offering has struggled to gain recognition. I think that's likely to change. Why? Because the company is shifting its retail focus to something more important: CRM.

In a report from [Microsoft Dynamics World](#), the company announced that it would be renaming its former Dynamics 365 for Retail applications to a new e-commerce brand, Dynamics 365 Commerce. But this is not just a name change. It's a direction change. By doing this Microsoft plans to offer technologies that will not only do what other popular retail systems are doing – integrating brick and mortar operations with e-commerce – but also helping its customers to better analyze what their customers are doing.

The idea is to enable its retail customers to more fully leverage artificial intelligence, data analytics and Internet of Things technologies so that they can not only improve operational efficiency and better measure what's selling in their customers' stores, but also more accurately determine who's buying and how to get people to buy more.

Its Dynamics 365 Connected Store application will, according to the report, “provide insight into the retail space, helping physical retailers understand and improve the in-store experience by analyzing disparate data from video cameras and IoT sensors to providing real-time and predictive insights that help store managers and employees make better decisions.”

The application promises to "transform the customer experience-from the digital experiences that make shopping fun and rewarding to productivity and collaboration solutions that help retail employees provide outstanding customer service,” according [to Microsoft](#). “In addition, intelligent systems provide deep insights to empower advanced decision making and personalization, delivering the fully connected commerce solution retailers need to build brand loyalty, optimize operations and supply chain efficiencies and deliver better business outcomes." Sounds great.

But isn't this all a little too late? Isn't Amazon light years ahead having already launched their virtually pilotless Amazon Go grocery stores that promises a quick way for customers to buy essential products using their mobile app and IoT sensors to monitor inventory? Aren't e-commerce platforms like Shopify, Magento and Big Commerce already responding to their customers' needs to marry in-store point of sale with their e-commerce websites?

Yes, these great companies and applications are further ahead of Microsoft. But no, Microsoft still isn't late to the game. Microsoft has already forged agreements with Walmart and Kroger to host their data on its Azure cloud platform. It already counts thousands of smaller retailers as customers. But that just sets the stage for what Microsoft sees as the real opportunity: to leverage data into more sales based on customer behavior and better efficiencies.

Its Dynamics 365 Commerce applications will be all about helping its customers - from corporate analysts to store managers and associates - get quick access to their customers' activities and then better understand how the data is reflective of their behavior. It will send alerts to employees that warn them of longer lines at checkout, inventory that may be subject to spoilage or freezers that may be suffering mechanical issues. It will suggest to store associates additional products to sell based on historical trends and buying preferences. It will offer ideas for marketing to those customers that prefer specific types of products.

This is CRM.

It's about providing technology that can not only collect the data but also interpret that information so that managers and salespeople can take actions that will best serve their customers...and build better relationships. Aren't Microsoft's competitors doing this already? Here and there. But there's a long way to go. The race for retail technology dominance is still in its early stages.

So, is Microsoft too late? Not at all. In fact, the company's CRM-focused approach may likely soon put it ahead of its more entrenched competitors.

Can Microsoft Teams or Slack Replace a CRM?

Just a few years ago, products like Microsoft Teams and Slack barely existed. But today, these applications - and competitors like G Suite and Box - are becoming required technology for many firms, large and small. They're collaboration tools for workgroups. But isn't that also what a good customer relationship management system does? In fact, if you own and implement a collaboration tool like these do you even need a CRM system at all?

Let's take for example, Microsoft Teams. It's only about three years old. But in that short period of time, the application has grown into a mature platform that rivals its older rival Slack. Teams is included with Microsoft Office 365 and Microsoft is making a big push to roll it out not only to its hundreds of millions of Office users worldwide but [to consumers too](#).

Like a CRM, Microsoft Teams is essentially a connector. It brings together under one roof email, files (including documents and spreadsheets) and a group calendar. Like Slack and others, you can create channels for group chatting, file sharing and video calling and conferencing. You can save data directly to Microsoft's online storage service OneDrive or access SharePoint projects. It's not only mobile but channels can be opened up to outsiders such as customers, vendors and partners to also share information. Slack and other competitors have similar functions.

But the biggest benefit to me about all these collaboration applications is their searching capabilities. Say for example you have a customer problem and multiple people in your company are chatting, emailing and sharing information about it until its resolved. A few months later you have a similar problem with another customer. Collaboration apps like Microsoft Teams and Slack allow you to search across the channels by keyword to locate these prior conversations and get answers much quicker. To me, that's a major part of customer relationship management and a high priority among our CRM clients.

All of this makes up a powerful way to communicate and share data across a workgroup and is even more useful when that workgroup is as dispersed as many of us have been over the past few months. But can it be a replacement for a good CRM system? Believe it or not...it can. It just depends on your organization's needs, and culture.

Many of our clients implement CRM systems and only use twenty percent of the capabilities. They focus on the contact management which generally means creating contacts with notes, scheduling follow-ups and appointments and sending emails. All of that can be accomplished in a product like Microsoft Teams.

Granted, those clients are missing out on important CRM functionality like automated workflows, marketing campaigns, service ticket generation, forecasting and opportunity

management. This isn't a fault, it's just a fact. They realize the importance of these CRM things but they never rise to them. Some companies just don't have the culture or the need to expand their usage of CRM to that level. They don't have an internal team to properly administer a growing CRM database (because a growing CRM database definitely needs oversight). They may not have a marketing group that can truly leverage the information in a CRM system to build inbound and outbound processes. Their sales management may not require advanced management and deep metrics on activities, closed sales or lost quotes. They know they should. But they don't. And they probably never will.

What these companies truly desire is a single database of all communications with their customers, prospects and vendors. They want to be able to quickly search this database for when a customer or prospect calls. They want to be able to quickly access files related to that contact. They want to see what is being emailed from the group. They need to look at each other's' calendars so that upcoming tasks and appointments can be viewed or activities from the past can be referenced. They sometimes may want to then integrate this data with bulk email services, accounting and yes, even a CRM system. All of this can be done in an application like Microsoft Teams or Slack. But there's big thing that's necessary.

That big thing is the same big thing necessary to make a CRM system successful: people. Microsoft Teams isn't going to do all of that stuff on its own and neither will a CRM system. To setup a great Microsoft Teams or Slack system that's delivering on its promises you will still need to have an internal administrator - or group of administrators - ensuring that the product is setup properly, users trained and processes followed. Otherwise you create a big mess. The same applies for a CRM system.

So, if you've skipped down to the last paragraph to get an answer here it is: yes, you can use a collaboration platform like Microsoft Teams and Slack in lieu of a CRM system. But it depends on what you want to do with it and what you're willing to give up. More importantly, it depends on everyone committing to the system and management providing the necessary resources so that it's used to its fullest capabilities under the auspices of a trained and supported administrative team. The success of any workgroup platform - be it a collaboration app or CRM - requires that kind of culture.

LinkedIn Takes Another Big Step Towards CRM Integration

So, will LinkedIn finally integrate with your Customer Relationship Management system? Well...kind of and maybe. And only if you have either Salesforce or Microsoft Dynamics (LinkedIn is owned by Microsoft. My company is a Microsoft partner).

LinkedIn already has a sort of very light CRM tool called Sales Navigator. The tool provides basic lead management capabilities that uses contact data from a user's connections and helps target potential contact and account prospects based on certain demographic criteria. Although it helps with basic research, it lacks many of the essential features that you'll find in a typical CRM such as opportunity tracking, forecasting and marketing as well as integrations with email and calendars.

The company [announced new enhancements](#) to its Sales Navigator tool which promises to "boost pipeline quality and increase sales and marketing efficiencies." The updated tool's CRM Sync capability will now be able to create new contacts (and check for duplicates) in a CRM system using LinkedIn data as well as flag contacts in a CRM system that haven't been updated within 24 hours after changes were made to them in LinkedIn. It will also alert CRM users when a potential "champion" moves to a new company.

The aim is to increase productivity. "Sellers have countless tabs open, copying and pasting information," product lead Lindsey Edwards [told Adweek](#). "You want the sellers to be out selling. 40% of sellers' time is spent on administrative tasks."

LinkedIn continues to expand the capabilities of Sales Navigator each quarter with updates so that its users can better view and track content with their communities and receive real time alerts for potential people in a targeted organization that, based on their activities, may be a potential influencer. New search features and reporting tools have been added and more enhancements are planned.

The CRM Sync capability is certainly a big step. But will LinkedIn ever replace a company's current CRM system? That's not likely in the near future. Instead, those who want better LinkedIn integration with their CRM system should bear these three things in mind.

First, if you want the integration, you're going to need either Salesforce or Microsoft Dynamics. Unless bigger partnership deals (translation: dollars) are offered by other CRM players, the company is going to stick to the CRM leader and Microsoft's own CRM offering as sales differentiators and our clients who are hoping that one day LinkedIn will integrate with their CRM system – if not one of the above two - are probably going to be disappointed.

Next, if you're going to want integration, you're going to have to pay to play. The CRM integration will only work if you have LinkedIn's Sales Navigator which runs about \$65 to \$135 per month depending on whether you buy it individually or for a team and commit to an annual purchase. Your free LinkedIn account is going to cut it.

Finally, I doubt there will ever be the “holy grail” of true LinkedIn-CRM integration. Sorry, but it’s unlikely that you’ll ever be able to search through LinkedIn, identify people with certain characteristics and then suck them into your CRM system for prospecting and lead generation activities. As a frequent LinkedIn user, I'm already getting enough spam from people taking advantage of the platform’s existing messaging tools. Allowing CRM systems to access more data would only exacerbate this problem which would likely motivate me - and many other business professionals - to retreat from the network.

But in the meantime, we'll take what we can get. And if you're willing to accept both the limitations and the requirements, you can have some integration between your CRM system and LinkedIn.

Will Nimble Solve Microsoft's Small Business CRM Problem?

When it comes to CRM for small businesses, Microsoft has never had a great answer. Which is a shame because it's a market worth potentially tens of billions of dollars.

As a Microsoft partner that focuses on small and medium sized companies my firm has had little to offer our clients when they ask about CRM options other than to direct them elsewhere. Their flagship Dynamics products are excellent, but they're pricey for a small company and clearly built to compete against the likes of Salesforce and Oracle.

There used to be (shudder) the Outlook Business Contact Manager but that application was thankfully discontinued after a few years of hair-pulling performance and other issues. Office 365 comes with something called the Outlook Customer Manager which is a shadow of what a good CRM system should provide and frankly has not received much attention from Redmond. So when Microsoft [announced last year](#) that it was partnering with [Nimble](#) – a powerful CRM application that's targeted (and priced) more for SMBs - my antenna went up. Why is Microsoft doing this? Could this be a CRM answer for small businesses in Microsoft world?

I think it is.

Nimble is already a great stand-alone CRM. But with its Outlook add-in – released in 2017 - users can live inside of Office, rather than having to navigate to an external application. Leveraging this capability, Nimble provides Office users the features you would expect from a good CRM application - contact, lead, and pipeline management - while using information from both Office and its own database. It's a multi-user, collaborative system that will let a team share emails and contact data from just about any device and provides insights about contacts with just a social handle.

Yes, it's an add-in to Office 365. No, it's not made by Microsoft. But it's a product that, like other third-party applications, Microsoft is getting behind. It's making Nimble available within its global channel partner network so that its resellers, distributors, consulting firms, and systems integrators can sell and implement it.

So, is Microsoft giving up on the small business CRM market? Yes and no. The strategy hinges on letting solutions like Nimble nurture the really small customers and hopefully help them grow into a bona fide candidate for Microsoft's more robust CRM offerings.

"We do have a small business Dynamics CRM package," said Gretchen O'Hara, a vice-President at the company who is working to help grow an ecosystem of solutions like Nimble for its partner channel. "But sometimes when a business is at the very small end, one to seven, one to

ten employees, they need to walk and grow really learning how to use CRM at the beginning level. As they need additional capabilities, it (Nimble) is a nice on-ramp into Dynamics." There has been some progress since the two companies entered into a partnership last summer, but there's still a lot of work to do. Nimble's President Jon Ferrara said that his company has entered into agreements with thirty of Microsoft's top fifty distribution partners and is in the process of onboarding a thousand resellers. "With Microsoft as a reseller, Nimble CRM adoption among resellers has accelerated, since there's no need to negotiate individual contracts, address specific integration requirements, or manage billing (it's all handled by Microsoft)," he said in an email exchange.

The biggest challenge for both companies will be educating Microsoft's partners like me. Many of us still aren't aware of the relationship and O'Hara is committed to changing that over the next few years. "We're in the middle of the rollout right now," she told me. "The next step is educating our CSP channel to help them understand what Nimble provides, and helping them with hands-on training and enablement."

If you're a small business owner researching CRMs you've probably found that many of the good ones already have integration with Office 365. You can debate whether Nimble's integration is any better or worse than its competitors. But one thing's for sure: Microsoft has chosen this application as its go-to CRM solution for small businesses and is banking on it to ensure that its small business customers not only stay loyal to Office 365 but also have a way to grow into good Dynamics customers too.

SALESFORCE

Why Salesforce May Not Be Your Best CRM Option

This week Salesforce released yet another version of its platform targeted at small businesses. I say “yet another version” because the company has been trying to penetrate this market for years. This time, the product is called [Salesforce Easy](#) and it's a "new" and "simplified" version of its product. Its price point is \$25 per user and it comes with additional functionality including one-step sign-on to Slack, Google and Microsoft 365, new data import tools and preset sales processes.

"Salesforce Easy is designed to help more and more companies help drive their businesses forward, tapping into Salesforce's technology expertise and best practices accumulated over the course of more than two decades," a representative told Vernon Keenan of publisher [SalesforceDevops](#). "Salesforce Easy is a new simplified experience for companies of all sizes."

Keenan himself seems a bit dubious about this product. I don't blame him.

"It won't, *ahem*, be easy for Salesforce Easy to succeed," he writes. "Salesforce Easy may break some of the traditional Salesforce channel models and will require the company to beef up its technical customer service and direct account services. For Salesforce Easy to succeed, Salesforce customer service will have to look a little more like Intuit or Microsoft."

What does he mean by this? Let me elaborate by giving a few reasons why Salesforce may not be your best CRM option, particularly if you're a small business.

The first reason is that Salesforce is not a small business-focused company. It's a company that has many products which includes a small business product. If you're a small business, be wary of this. It's like buying a salad at a McDonalds – they offer it but you know it's not the restaurant chain's main focus.

The CRM platforms that best serve the small business market are focused on serving only the small business market. You know some of these already. They include [Zoho](#), [Insightly](#), [Sugar](#), [Nimble](#), [Copper](#) and others. For Salesforce, the company's bread and butter comes from its largest enterprise customers. And the enterprise market is completely different from the small business market.

As Keenan notes, the company's support infrastructure isn't setup to handle the types of support requests that will come from small businesses. For example, small business owners are less informed about technology, are often ignorant and impatient when tech problems occur and can be more demanding than larger corporate employees who have less stake in resolving an issue timely. I say this with peace and love as a small business owner myself that behaves in exactly this way. To really serve this market, Salesforce would need to overhaul its support infrastructure, change how it provides its services, figure out a more affordable service model, and probably hire a thousand psychiatrists to handle the crazy personalities of small business owners like myself. I don't see that happening.

The second reason: Salesforce lacks a channel that can serve small businesses.

Software vendors in Silicon Valley love to say how “easy” and “simplified” their products are to setup and use. Oh sure. Try telling that to the person running a distribution business in Oklahoma City. People have different skill sets and what’s easy and simple for some may not be so for others.

Which means that most smaller firms will need help with setup, training, customization, integration and data migration. Some – in order to save money - will do this on their own and that will create headaches for Salesforce support who may find themselves spending dozens of hours with a \$25 customer. Many others may reach out to a partner. But Salesforce partners have been recruited to serve corporate customers. Their channel consists of large firms like Deloitte, Accenture and IBM and a myriad of specialists that charge anywhere from \$250-\$750 an hour for their services. A small business owner is unlikely to shell out this kind of money and these partners are not interested in a mere 10 or 20 hours of service. They're used to multi-hundred-hour projects.

Finally, Salesforce doesn't really want \$25 per user customers. The representative that Keenan spoke to pretty much admitted that by saying "larger companies can try it as well, understand what functionalities they want or need and then rapidly scale with the tools they need along in our full portfolio."

Salesforce Easy is positioned as a small business product, but to me it seems more like a lead generation tool that enables the company to generate a new revenue stream for a demo product which the sales team can then use to attack corporate prospects. The company’s stock price isn't going to grow with \$25 per user customers.

Even if a small business signs on, they will be strongly encouraged to purchase add-ons to really “get the full value” of the application. Those companies will find that many of those extra apps are already included in small business CRMs like the ones mentioned above. The reality is that when a small business pays \$25 per user they'll not only complain about the price but the great majority will ultimately never move up that food chain.

An employee isn't going to get fired for buying Salesforce. It's the BMW of CRMs. But small businesses don't need BMWs. We need F-150's. Something that packs in a lot of features for an affordable price and is built to serve our market. Salesforce really is a great product. But I don't think the company is best positioned to serve small businesses.

The Inconvenient Truth About Salesforce

Earlier this month Salesforce, the undisputed leading customer relationship management software provider in the world, announced that it was laying off 10 percent of its workforce - more than 7,350 employees - and closing some offices.

“The environment remains challenging and our customers are taking a more measured approach to their purchasing decisions,” said CEO Marc Benioff [in a letter](#) to employees. “We hired too many people leading into this economic downturn we’re now facing, and I take responsibility for that.”

These cuts come after previous job reductions [last fall](#), the [departure of key executives](#), and an unprecedented decision [not to forecast earnings](#) for the upcoming 2024 fiscal year due to "a very unpredictable macro environment as our customers are working to ensure their businesses are also healthy for the long term.”

Should those of us in the CRM industry be worried about Salesforce? I don't think so. The company is, like many other large tech companies, taking cover under an economic and financing slowdown to cut the fat of tens of thousands of unproductive employees.

But Salesforce's troubles do expose a very inconvenient truth that many of us in the business have known for a very long time: the cost of their software cannot be justified by most of their customers.

Salesforce is not cheap. For [sales capabilities alone](#) pricing starts at \$25 per month per user, but that's for the bare-bones "Essentials" package. Most businesses that want to take advantage of workflows, pipelines and forecasts will want to use the Professional version, which is \$75 per month per user. Many of my clients want advanced reporting and 24/7 support from the vendor which can only be accessed from the Enterprise version which costs \$150 per month per user. That's \$36,000 a year for a sales team of just 20 people. It's a pretty hefty fee.

And that's just for sales. If you want the ability to [track service calls](#) or to perform [marketing campaigns](#) you'd have to subscribe to additional modules which run anywhere from \$150 per month to...well... you'll just have to "call us for pricing" where you can be guaranteed to get the hard sales pitch from an overly eager and slightly desperate sales rep fighting for their commission. If Salesforce still doesn't address a specific need, then there's a myriad of third-party products that may, but these aren't cheap either.

If your company desires service (as most do) then that's another ballgame. CRM software providers love saying how “user friendly” their products are. But the reality is that the customers who subscribe aren't CRM experts and need outside consulting help for setup, implementation, integration, customization and training. Because Salesforce has traditionally been targeted for larger enterprises its partner channel is littered with ginormous (yeah, it's an actual word – I [looked it up](#)) firms like [Accenture](#), [McKinsey](#) and [PwC](#) who, though excellent at what they do, charge hefty fees for their consulting services. There are many other great Salesforce consultants. But these too aren't cheap.

I understand that you get what you pay for and Salesforce is truly the Lamborghini of CRMs. But, other than a minority of companies that have these needs, the reality is that most small and mid-sized companies - who make up the lion's share of American businesses - require an intermediate level of CRM features to help them grow. They need contact management and pipeline reporting and relatively simple workflows to respond to requests or nudge staff not to forget about a task. They need the ability to log incidents and not let any big problems fall through the cracks. They want to send mass emails to various groups and ensure that responses are tracked. If you ask any owner of a small or mid-sized company if they are currently doing all of these things you'll likely get the eye roll, because they're not.

However, all of these things can be done with a number of affordably priced CRM platforms like [Zoho](#), [Nimble](#), [Sugar](#) and many others (my company implements some of the products mentioned in this column). When I say affordably priced, I mean at literally half of the price of Salesforce when you take into consideration all of the features their modules include. And because the partners and consultants who help with these products don't work for Accenture or PwC the cost for their services are much lower too.

Which brings me back to the inconvenient truth about Salesforce. Because the company's products are so expensive relative to the market, their small and mid-sized customers wind up spending much more on software licenses than on what they truly need: service. They get stuck with that Lamborghini when all they really need is a Camry. The sales reps at Salesforce get their commissions. The customers get a super-charged sports car and no idea how to drive it.

That fact was barely acceptable when economic times were booming. But now that the economy is cooling, businesses are significantly more focused on getting bang for the ever decreasing value of their buck. They're looking harder at the tech they already own and being tougher about new tech investments. They're avoiding over-priced technology and instead re-focusing on getting greater production from the more affordable CRM tools which, with a little outside help, can pretty much do what Salesforce does but at a much lower price point.

Can Einstein Help Salesforce Completely Solve This Chronic CRM Problem?

It's a chronic problem and it's been going on since my company began selling sales force automation systems back in the '90's: Managers need complete and accurate data to better run their companies. But their salespeople feel that the time spent entering that data is taking them away from doing what they do best: selling.

The explosion of CRM systems over the past decade has only intensified the issue. That's because a CRM system is, in the end, just a database. And if people aren't getting the right data into it, the value of the system seriously diminishes.

Of course, that's easier said than done. Getting sales people – particularly those old-school ones - to use their CRM system has arguably been the number one problem that has challenged both the business owners and sales managers that I know. Sales people are typically very social, convivial and personable...and are oftentimes notorious for resisting technology. The older ones are set in their ways. They have their "process." They don't want to be micro-managed. My struggle, along with my clients, is to convince their teams that great technology certainly doesn't make a great salesperson. But it can definitely make the greatest ones even better.

So how to solve this problem? Maybe, just maybe, Einstein has an answer. No, not THAT Einstein. The Einstein I'm referring to is Salesforce.com's voice automation technology. Introduced a few weeks ago, the tool intends to help salespeople do what they normally do without typing. The Einstein Voice mobile app will let a salesperson get advanced information about an upcoming meeting, log meeting notes, notify team members, create tasks and interact with data dashboards just by talking into his or her smartphone.

Einstein isn't just about the natural language interface for salespeople. The application will also be used to trigger workflows and create automated customer-facing communications using AI-based bots in the years to come.

"We're in the midst of an incredible technological shift, where the power of voice is fundamentally changing the way we work," Parker Harris, co-founder and CTO of Salesforce said in [this ZDNet report](#). "Einstein Voice will usher in a new era of conversational CRM, delivering new levels of productivity and redefining customer experiences with voice technology."

There are other third-party applications (and competitors) that can provide the same functionality for Salesforce users – as well as users of other popular CRM applications. But this is the first time the CRM giant is offering this capability natively, at least for its enterprise users. Next up:

integration with applications like Google Assistant and Amazon Alexa so that commands can be done in the office using smart speakers and other devices.

OK, it's not nearly as important as some of the scientist's other theories and as far as I know Salesforce hasn't solved the problem of time travel...yet. But Einstein (the app) - and other voice technology like it - will soon put to bed the chronic problem of getting sales people to use their CRMs systems, and remove one less headache for sales managers.

How Salesforce Wants to End Spam

One of the most essential uses of a CRM system is email. It's still the primary form of business communication and good CRMs track both inbound and outbound emails and connect them to accounts, contacts, leads and opportunities so that teams can have a view of all communications. Those same CRM systems also use email for marketing campaigns and mass communications. But as essential as email is, there's still a giant spam problem. According to SpamLaws.com, an internet security research site, approximately 14.5 billion spam emails are sent every single day, making up about 45% of all emails sent.

So now Salesforce.com is stepping in to fix that problem - and they plan to use blockchain to do it.

A few weeks ago, the company [was awarded](#) a patent for a blockchain-based platform that the company says can be used to compare messages from the time they were sent from an originating email server to when they are received by another server and flag potential spam - using a custom matching system - if specific changes were made to the email that would indicate it's an unwanted message. How? Salesforce's blockchain process would be used as the basis for comparing data (i.e. sender, recipient, other identification) included in the originating message from the first server to the data in that message when a second server receives it. A match will allow the message continue. If there's been any change to that email - as spammers are known to do - then the message would be marked as spam.

According to Salesforce's patent, the use of a blockchain platform will help "reduce the number of false positives through the proposed matching system" because it will "better identify legitimate (wanted) messages and distinguish them from illegitimate (unsolicited) messages." The company believes that the process can also be used to better protect transcripts, deeds, property rights and legal documents.

I see the company's plan impacting the business world in two ways.

For starters, it's yet another validation of blockchain - where digital transactions are permanently, chronologically and publicly recorded in a virtual "ledger" that can never be altered. Many crypto currencies base their entire existence on this form of accounting and, as its popularity has grown, so has the interest of larger companies - from banks to CRM software makers - to figure out how to use it to better their own security and audit trails. A reliable way to combat spam using blockchain would be yet further affirmation for this approach in the corporate world.

More importantly, Salesforce's patent could significantly reduce spam - a problem that has plagued sales and marketing professionals like myself for decades. As a salesperson I'd

unscientifically estimate that an easy 20 percent of the messages I send go into the spam folders of customers and people that I personally know which causes disruptions and missed opportunities. On the flip side, I easily spend 15-20 minutes a day hunting through my spam folders to make sure I'm not missing legitimate emails. And believe me - plenty get incorrectly filtered.

All of this sounds great, but it's not going to happen tomorrow...and its real-life use is still uncertain. "Assuming it will be implemented, right now we must remember it's a patent filing, not a working concept," writes Matthew Beedham on TNW's cryptocurrency site [Hard Fork](#). "Sounds neat, but it seems unclear if and how this system will prevent the spam and junk mail from those dodgy senders that got your email, from that time you forget to check the opt-out option, on that website you probably shouldn't have signed up to."

Salesforce.com Wants to Help Your Company Re-Open. But is it Violating Your Employees' Privacy Too?

Is a CRM system necessary for re-opening your business, post-Coronavirus? Salesforce.com thinks it is, and the company is providing a new suite of tools to help its customers do just that. The company introduced (or re-introduced) a bunch of technology solutions and resources designed to make re-opening, re-training and responding to CV-19 issues faster and easier.

"Every company and community in the world is focusing on how to safely reopen and get to a new normal," Bret Taylor, the company's President [said in a statement](#). "We're bringing together powerful new technology, our partners and network of experts to help organizations reopen and recover from this crisis while putting employee and visitor health and safety first."

The product suite is called Work.com. Its applications will offer customers the ability to "manually trace health and relationship contacts" of its employees in a "safe and private manner" and then share that information with health organizations, government agencies and the private sector to "record and understand data, triage and evaluate patients and provide ongoing engagement and monitoring."

The suite's employee wellness offerings will allow "leaders to gather the data needed to monitor and analyze employee and visitor health and wellness." From that information, companies can then "create employee health surveys, monitor wellness trends and use data to make informed decisions on the return to work, all while keeping employee health information secure."

Salesforce is a good company and one way to look at this is that the CRM giant - despite its profit motives - is trying to do its part to use technology for the common good. We all want to work and shop in safe places. Health and safety are certainly the number one issue that must be addressed for any business re-opening their doors over the next few months. To do this, data needs to be collected and employees need to be monitored. Work.com also comes with tools to help better manage shifts so that social distancing objectives can be maintained as well as provide timely communication to a workforce. There will also be additional resources and input provided by a team of outside medical and economic experts.

So, this is a good thing, right?

Right. But doesn't it all sound just a little creepy too? Of course, it does. What Salesforce's Work.com is really doing is collecting all sorts of health information from employees in an effort to build a data-driven strategy for minimizing the health risks of re-opening a business. But in doing so it raises a bunch of very grave questions.

Like, where does that data collection end? Who's looking at this data? How can an employer stay on the right side of HIPAA - the Health Insurance Portability and Accountability Act that imposes federal regulations on people's healthcare information? How secure is that data? What are the parameters of the data that's being collected? What if an employee doesn't want to participate? What if another health issue is discovered that's not related to the virus?

I'm sure that the leaders at Salesforce are well aware of these issues and are doing what they can to minimize their impact on an employee's confidentiality. But the sad fact is that in order to restore our economic growth, something will have to be given up. That something is privacy. Hundreds of companies like Salesforce are currently introducing their technologies to help employers maintain a "safe" workplace, from temperature checking kiosks, to biometric scanners and of course CRM applications that better track schedules, activities and health data.

Most employees will accept these things as a necessary evil in order to get back to work. But there will be a limit. Governments are working hard right now to combat and stem the spread of the virus. But eventually they'll catch up to the fact that some lines have been crossed and will have to take a hard look at the price that was paid to win this war. And I'm betting that regulatory changes will be demanded of the data collection being done by software applications like Salesforce's Work.com.

But not for now. As an employer, your best course of action is to do what you need to do to balance the data you're collecting with the overall welfare and privacy concerns of your employees and customers. And remember, as well-intentioned as Salesforce and other tech companies may be, just because a software system is open to accepting your employees' data doesn't mean that you should be open to collecting it.

If you overstep the mark and violate people's privacy, I'm not sure Salesforce - or any of the other tech companies enabling your ability to do this - will have your back.

How to Save a Failed Salesforce Implementation

Over the years my firm has been asked to resurrect many failed customer relationship management applications. It doesn't matter whether it's Salesforce or any number of their competitors. The reasons are always the same and what I've learned is that finding out those reasons why a CRM implementation failed will determine the best course of action for rescuing it...or perhaps not all.

Even the best CRM systems are difficult to implement. They take discipline and regular, consistent effort. They require a good administrator and a project team made up of dedicated, positive employees and a competent outside consultant. Most importantly, every project needs to have management fully behind it. I've found that if people are blaming things on the CRM system it's almost always not the CRM that's the cause of their problems. In almost all the cases it's operator error. It's like giving a soccer player a baseball bat and telling him to hit a home run. Wrong person. Wrong tool.

If this sounds familiar then that's good news. Because now you can move forward to reverse the mess, and a great place to start is by reading [Melanie Fellay's piece on SalesforceBen](#), a support and resource site for the popular CRM platform. Her recommendations are really not Salesforce specific. They apply to any CRM system.

Fellay is the CEO of [Spekit](#), a provider of digital training tools based in Denver. She saved her company's Salesforce system from failure. How? By doing the kinds of things we should all be doing before we implement a CRM system.

She spent a considerable amount of time reading about Salesforce and general CRM implementations. She put a stop to all usage, reviewed her company's sales processes and then leaned on a few external tools to analyze the data in the system as it related to those processes. She identified a team of internal champions and gave them the authority to help her re-boot the platform. She asked the team to break down the project into smaller pieces and tackled each one at a time.

"This new Salesforce implementation was going to be a challenge and require buy-in from end-users across the board to truly be successful," she wrote. "My hope was that delivering on some of these small wins early on would demonstrate to these key end-users that my objective was truly to make their lives easier not harder...which in return would help me gain their "champion" support – and it did."

She also implemented a complete data cleaning overhaul and then set about on a refreshed approach to training and documentation. Ultimately, she conquered "The Beast" as she called it. But there are two things that she inferred in her tale that deserve greater attention.

The first is her title. Melanie is the CEO and co-founder of her firm and although I don't recommend that the top person in an organization get so deeply involved in a CRM rescue it remains vital that this type of a project is run by a very senior manager in a company. Someone who is tasked with getting the job done and has a strong enough personality to deflect all the usual complaints and pushback and instead stay focused on achieving an objective. That person should have the team of champions report to him or her and give them the power to do what they need to do in order to achieve their agreed-on deliverables. In every CRM implementation that I've been involved - new or rescued - it's always the senior management person that makes the difference between success and failure.

The second important thing to note is commitment. Melanie said that her team was considering replacing Salesforce with a homegrown solution. "That solution didn't make sense to me," she wrote. "Even though I was new to Salesforce, I stared at the Salesforce tower under construction in the heart of San Francisco every day from our office windows...so my gut told me that a homegrown CRM couldn't possibly compete."

She was right to resist that temptation. Replacing her existing system would not have solved the problem because – I'm convinced – her users would likely fail with any CRM system. Replacing a great system like Salesforce with any one of its competitors would be like replacing a BMW for a Mercedes. They're both excellent vehicles that will get you to where you're going fast and safe. Melanie rightly determined that Salesforce wasn't the problem. It was the way it was implemented. Given the amount of money invested in it so far, it would've been a waste of resources to start fresh with something new, especially when knowing that Salesforce can do the trick in the long run. So, she stuck to her guns. Good for her.

Failed CRM systems are rarely due to the software. It's almost always due to the implementation. Before you throw your system out the door, take a hard look in the mirror. With the right approach and the right people involved, your CRM system can be resurrected from the dead and put to good use. It may make much more sense to invest your resources in doing that, rather than starting from scratch with something else. It certainly did for Melanie.

This is Why Google Shouldn't Buy Salesforce

Say you've got a spare billion or so lying around and you want to buy a baseball team. Are you buying the team because of its fans? Its stadium? Its brand? Definitely. But why does the team have this value? Why are the fans coming to the games?

It's because, at the heart of it, a valuable baseball franchise is all about its fan base and its fan base is all about its players. Ignoring the talent on the field will, over time, erode the team's popularity. Its fans will disappear. Its stadium will empty and its TV ratings will fall. Don't believe me? Just look at what happened to my Philadelphia Phillies after its 2007-2011 playoff run. The team - due to less talented players – painfully declined in all of these areas.

Which brings me to Google. And Salesforce.

It's no secret that Google's cloud division - which is trailing far behind its rivals Microsoft Azure and Amazon Web Services (AWS) - is looking to make a big acquisition in order to play catch-up ball. Now a report from [Business Insider](#) claims that the company may be considering a purchase of Salesforce.com to fulfill this ambition.

At first, the idea - which is being floated by investment firm RBC Capital - has some attractive benefits. Salesforce's cloud platform - Force.com - has been growing by double-digits as the company and its community continues to add users and build great business applications.

Acquiring this community, and its related infrastructure, would almost immediately vault Google ahead of Microsoft to become the number two cloud-based platform in the world behind AWS. But for such an acquisition to succeed, Google would need to address a few enormous questions. Among them of course is the fate of Salesforce's dynamic CEO Marc Benioff - a customer relationship management (CRM) and cloud pioneer - who has been an instrumental part of the company's success and evangelist of CRM worldwide. But the more important question Google will need to address is the fate of Salesforce itself. Because, like a great baseball team, it's the Salesforce applications that are drawing the fans.

That's because the value of Salesforce is not its cloud infrastructure. Its value is that it's a CRM company that delivers its world class solutions via a cloud infrastructure.

Salesforce's brand is synonymous with CRM. Its stock ticker is CRM. Like Benioff, its leaders are also CRM evangelists. Its [mission statement](#) is "to empower companies to connect with their customers in a whole new way." Salesforce has used its cloud infrastructure as a platform for its

very passionate community to develop solutions for their customers, always with the intention (but admittedly not the requirement) of eventually connecting to Salesforce products.

When my customers are evaluating Salesforce, they're not comparing it to Azure or AWS. They're comparing it to other CRM applications. That's because both Azure and AWS are modelled very different from Salesforce. [AWS's mission](#) is "to enable developers and businesses to use web services to easily build and be paid for sophisticated, scalable applications." Microsoft's [definition of Azure](#) is "an ever-expanding set of cloud services to help your organization meet your business challenges." These are not CRM companies. They are cloud service companies that host many applications, with some of them happening to be CRM.

Does Google realize this?

Does Google understand that, like the fans of a baseball team that come to watch great players, swallowing up Salesforce and prioritizing cloud over CRM would - over time – ultimately sabotage the very reason that attracted them? How long would it take for Google to start watering down Salesforce's brand and neglecting CRM as it brings other, unrelated applications and its own search and advertising tools to the cloud platform it acquires? If this happens Benioff, an iconic entrepreneur and philanthropist, would likely not stick around very long under a Google regime. Neither would the passionate community that he built which underscores the success of Salesforce's cloud platform.

Maybe Google knows this and doesn't care. But it should. That's because, like the fans of a baseball team that abandons its players, the very people that are the core of Salesforce's cloud success will abandon their team if Google abandons Salesforce's core CRM applications. It would be inevitable. I saw it happen, here in Philly.

What Do Salesforce and IBM Have in Common?

I was discussing customer relationship management options with a prospective buyer named Julia a few months ago. She's the VP of Sales at a relatively small (250+ person) company. Julia's been in sales for over 20 years, and she's worked with a few CRM systems. Now she's tasked with replacing her company's old application with something cloud-based.

For a senior executive at a small to mid-sized company, this task isn't easy. The CRM market in 2020 offers many, many choices. But there are also many unknowns. Will she need significant customizations? Will there be enough resources to help support her implementation? Will the new system integrate with her existing financial system? Compounding the dilemma is cost: why is there such a disparity? Why is one system priced so much lower (or higher) than another? Julia talked to about a dozen different CRM providers and every one of them tells her that their product is the best. And for all she knows, every one is telling her the truth. Making the decision even harder is that the CRM system will be a core company application which means it will require a significant investment of both time and resources. The failure to choose and implement the right one will be Julia's failure and no one else. This is not an easy decision.

In the end and with her job security and reputation in mind, Julia chose [Salesforce](#). It was an unexpected choice for some of the colleagues helping her evaluate the different applications mainly because Salesforce was by far the most expensive option among the final candidates and seemed to offer about the same level of features, support and scalability. So why Salesforce? "Well," she admitted to me. "You don't get fired for choosing IBM."

[IBM](#), if you're too young to remember, was the Salesforce of its day. For arguably about 30 years - from the 1950's to the 1980's - IBM was the epitome of technology companies. It's blue-suited, red-tie employees (yes, they were mostly male because it was the 1950's to the 1980's) implemented software and mainframe systems at some of the largest companies in the world. Its reputation for world-class service was widely known. IBM is still a great and massive company today but over the past few decades it's taken a backseat to other, more celebrated technology companies like Google, Microsoft and Facebook. But back in the day, IBM was, without argument, the company that every tech company wanted to be.

Which is why when an executive like Julia chose an IBM system back then, even though the price was usually much higher than its competitors, management understood. It was by far the most conservative decision. And besides, you get what you pay for.

In the CRM world, Salesforce is the IBM of the 2020's. The company has built its brand to be synonymous with CRM (case in point: its stock symbol is, you guessed it: CRM). It was one of the very first to the cloud and remains dominantly first in market share. But even though Salesforce has the largest brand and the most recognizable name of any CRM application, is it necessarily the best? Of course not. As great as the Salesforce ecosystem is, the company has many formidable competitors that offer their own cloud-based solutions for a much lower price point.

So when Julia went to her CEO with her decision to purchase Salesforce she did so knowing that she would be challenged about the additional expense. But she also knew that her CEO could argue that although another CRM may be more cost effective, even a better solution. But, they're not Salesforce.

Should you choose a software that comes at a lower cost and seems just as good, even better than Salesforce? Or should you go with the easy, risk-averse option. In the twenty years we've been implementing CRM systems I've found that, when an application is implemented the right way with a competent internal and external team it really doesn't matter what brand you go with. I've seen many companies implement many CRMs other than Salesforce happily and with a much lower investment.

So why does Salesforce win over executives like Julia? It's because executives and managers like her want to keep their jobs and they'd rather pay a little more for less risk. This decision may not be in the best interests of the companies they work for- or maybe it is. But it's certainly in theirs. You don't get fired for buying IBM...sorry...Salesforce.

Salesforce Has Fixed Your CRM User Adoption Problem

We sell an on-premise customer relationship management software called [GoldMine](#) which has an excellent analytical feature: the software literally records the number of keystrokes a user makes every day. Why is that important?

When I get a complaint from a GoldMine client that they're disappointed with the software the first thing I do is look at all of their users' keystrokes. And what do I usually find? Oftentimes not a lot of keystroke activity! Which leads me to ask how can you complain about a product when it's not really being used?

This is not just a GoldMine problem. It's a CRM problem. In the years that my firm has been implementing CRM systems, particularly for our small and medium sized clients, without question, the number one issue has been user adoption.

That's because a CRM system is not an accounting system. Or an order entry or inventory management system. You don't necessarily need to use the system for essential business processes like sending out invoices or paying bills. But a great CRM system provides many other benefits, which is why management at countless clients of mine have struggled to persuade their employees to make better use of their applications. They invest in training. They hire special administrators. They cajole, threaten and even plead. Some succeed. But many never get the adoption that they hoped for and many of those are disappointed with the ultimate return on investment from the system.

So how do you fix this adoption issue? [Salesforce](#) has the answer: the company is not-so-secretly watching its customers.

"We're working on a lot of data science," Meredith Schmidt, who is an executive vice president at Salesforce, told me on a recent podcast I did for the [Psychex Business Series](#). "Right now, we have an adoption team. We can look at reports and say "hey, this customer is not adopting so let's try and help them.""

Creepy? Maybe. But is this any creepier than Facebook making content suggestions based on your likes or Google displaying ads as a result of your prior searches? Of course not. Don't you want to get the full benefits of your CRM application? Of course, you do.

My best CRM clients use maybe 30-40 percent of what the software does and, sadly, a not-insignificant number of clients use it merely as a glorified rolodex. These are the clients that

ultimately throw up their hands in frustration, blame the software and ultimately blame me for recommending it. But the more the vendor can get involved, identify problems and make suggestions for better usage, the more chance of adoption going up and the happier the customer will be.

This is not so difficult. A cloud-based CRM provider has the data. They can identify a small customer where activity is under par. Salesforce, for example, has data from hundreds of thousands of customers and can leverage that information through artificial intelligence to make recommendations for better using the system. These recommendations, according to Schmidt (who assures me that privacy is maintained), can come as a suggestion through the software or by a human communication via their adoption and customer service team.

Rather than an on-premise software like GoldMine which monitors keystrokes after the fact, Salesforce is leveraging its cloud platform to better monitor user activity immediately. "The engagement in the product is where we're going because it's real time," Schmidt says. "It's looking at what you're doing and how you're doing things and trying to bring you more benefit. If you do these things your ROI should increase."

Schmidt contends that her team at Salesforce doesn't know the name of the customer but they can still help. "What I can do is actually start suggesting things, like "hey, customers of your size also bought this product" or "customers who wanted to increase leads by 30 percent did these three things and you haven't set this up yet,"" she says.

Rest assured, Salesforce won't be the only CRM vendor doing this. Other CRM vendors are recognizing that that monitoring user activity and making recommendations can solve the long time, persistent problem of CRM adoption. Finally, the vendors are leveraging AI to help customers use their products more and better. It will make for happier customers, which means paying customers. And it's already happening.

So yeah, Salesforce is watching you. Good.

Why Not Asana Instead of Salesforce?

Is there really a difference between a project management and a customer relationship management application? Maybe you can make the case if you're running a larger organization. But if you're a small business owner or in charge of a team, the line is really blurred. So much so that it may persuade you to re-consider a project management application like Asana, (or one of its [many competitors](#)) in lieu of a customer relationship management application like Salesforce.com (or any of its many competitors).

Why?

Just think about it. Call it a sales opportunity or a marketing campaign, but aren't these things just projects? You're organizing targets and assembling teams. You're setting up tasks and creating appointments. You're making calls. You're logging activities and taking notes. You're collaborating with people in your company. You're generating documents and sending emails. You're tracking progress all the way through resolution, good or bad and then you're getting reports during and after your projects telling you how you did.

CRM systems do this. But then again, so do many project managers.

If you don't believe me, take a look at [Asana's website](#). The application, which has more than 70,000 organizations using it, is being positioned to manage projects for any team within an organization and that includes sales and marketing teams. The company says its software will track sales pipelines, onboard new accounts, manage activities and perform goal tracking. On the marketing end, Asana users can create campaigns, coordinate activities, track responses and provide metrics.

Asana [introduced](#) a new set of workflow rules that puts its platform on a more equal footing with many CRM applications. These workflows will auto-assign teammates to new tasks based on a custom field status (e.g. type of work) or on a parent project, set and shift due dates, assign work to the right people and trigger follow-ups when information changes.

CRM companies will say that their offerings do much more and that their capabilities are far more robust than just a simple project manager and in many cases they're right. Great CRM systems have advanced opportunity management, service desk capabilities and are customer communication capabilities that include website integrations, chat and email which leverage artificial intelligence algorithms.

All of those features are great for larger organizations. But does the typical 50 or 100-person company – my company’s bread and butter client – need all that?

For this market, I’m finding that that more and more project managers (like Asana) are pretty much doing what CRM systems do. The good ones integrate with many cloud-based services as well as all the popular email, calendar and communication systems. They do a good job of tracking activities on projects and within contacts and accounts and managing interactions. But more importantly, their features expand beyond just sales and marketing.

They reach into human resources, accounting, operations and any other part of a business that has a project, which basically means every part of every business because isn't everything just a project? Aren't we launching new products, scheduling a trip, hiring a new manager, redecorating an office or planning a holiday party? When you think about it, shouldn't your CRM system be doing all of this?

Many CRM vendors do offer project management capabilities, add-ons or separate modules. But a project management application like Asana has all of this as part of its core functions. It’s designed to be used by an entire organization in addition to the sales and marketing team. My company has been selling CRM systems for many years. But as I've watched project managers grow, I've also been taking note of their overlap with the very products that we offer. More and more I'm starting to realize that, for many of our SMB clients, a project manager might actually be better idea for these companies.

Someday in the not too distant future, I think vendors of both types of these applications will realize that they’re pretty much doing the same thing as each other.

HUBSPOT

The One Thing HubSpot is Missing

I have to admit, as a CRM specialist HubSpot has really impressed me over the past few years.

What was once a popular inbound (and outbound) tool aimed towards marketers, the platform has evolved into a full-blown customer relationship management system. For a while I would tell companies evaluating HubSpot that it was a "good marketing platform with a CRM add-on." But that's not necessarily true anymore. It's now a very good all-around CRM platform. And getting better.

By better I mean that the company is expanding the capabilities of its software to slowly (but surely) turn it into a suite of business applications that can perform most tasks that a company needs. Just look at the features that the company announced this week at its [Inbound Conference](#). For HubSpot, it's all about improving "connections."

"Businesses are in a crisis of disconnection today," the company's CEO said in a [press release](#). "Their systems and data are disconnected because of cobbled point solutions. They're disconnected from their customers, as buyers tune out saturated channels. "We're committed to helping our customers grow in this new world by providing strategies, technology, and communities that foster deeper connections."

To back up her claims, HubSpot [rolled out](#) expansions to its payments capabilities, which now allows merchants to better customize their payments and there will soon be capabilities to connect those details with HubSpot payments transactions and to its quote-to-cash solutions that do quoting, billing and contracts.

The company also added new AI features to help identify problems in a database including the automatic flagging and resolving of errors before data is published. There's also a new "custom object builder" which will help enforce more consistent data entry with property validations and a "data quality command center" with insights and analytics on data integrity.

Also, they announced a new analytical tool that will "provide marketers with detailed visualizations that make it easier to identify moments in the customer journey that can be optimized for better conversion, and deeper insights into customer behaviors."

On the service side (wait, service?) the company announced new connectivity tools to help teams doing service to better connect with their customers, complete with a helpdesk, channels and automation. There will soon be integration with the communications platform WhatsApp and enhancements to inbound calling.

All of this is great, but it speaks to a much larger change happening within the HubSpot ecosystem. All you need to do is look at the platform's new features and expanded modules and it becomes obvious: what was once just a marketing application now has a "sales hub" a "service hub" and an "operations hub." It's doing quoting, billing and contracts. It's receiving cash. So what's next? Well, isn't that obvious?

It's accounting. And I bet that's coming too.

As the company evolves its platform to handle all areas of a customer's business, it will eventually need an accounting solution. Sure, the company can (and does) provide integrations with some of the more popular accounting platforms for small and mid-sized businesses. But isn't it time to step up and take those products on directly? If I'm one of the 150,000 HubSpot customers that has enjoyed the product's evolution, I'd be interested in a one-stop, full-blown, integrated business application. Right now, that's what's missing from HubSpot.

My advice to the company's leaders: go for the accounting. Go ahead and take on Intuit and Xero and Sage and the others. You can build something just as good, brand it just as well and attract a growing number of your 150,000+ existing (and future) customers to choose your platform because of its all-in-one capabilities. Start now, build relationships with the accounting community (who will be your biggest influencers) and capitalize on the dissatisfaction I hear from many of my clients with the existing accounting options available for them.

Zoho has done this. Microsoft and Salesforce have done this. Given the company's expansion of late, I'm betting that HubSpot will too.

JotForm Adds HubSpot So That You Can Stop Losing Website Leads

It amazes me how many companies I know – particularly small companies - that go to great effort and expense to build cool websites and attract leads don't complete the process. There's a disconnect when visitors arrive and request more information or have a question. When they fill out a form their contact data is just emailed to someone in the sales department who then has to enter that information again into the company's CRM system. Errors occur and - not surprisingly - follow-ups are unreliable.

It happens a lot and when it does sales inevitably get lost. And yet, simply integrating a company's website with their CRM application would solve that problem and create more revenue opportunities.

Maybe the fact that this isn't happening as much as I would've thought isn't so amazing. Most good, mainstream CRM applications do have the ability to integrate themselves with a customer's website. But it takes some effort and a little technical expertise and these are the kinds of things that are sometimes in short supply at the typical small business.

But there's an easy way to do this which doesn't take much effort or expertise. Just create a [JotForm](#) and use its built-in integration with popular CRMs and email marketing applications like [Zoho](#), [VerticalResponse](#), [MailChimp](#), [Insightly](#), [Keap](#), [Highrise](#), [Constant Contact](#), [Salesforce.com](#) and now...[HubSpot](#).

Last year HubSpot was added to JotForm's list of partners because of its growing popularity and user demand. The integration is available for both products and for both their paid and free versions.

The integration process is the same for most of these applications. You create a JotForm and, after choosing the HubSpot integration and logging in, you'll be automatically prompted to map your form's fields to the available fields in HubSpot. Then the JotForm is easily added to your website.

Once complete, visitors can register for an event, request information or ask questions on your custom JotForm and when they submit the form that information automatically gets added to your CRM - HubSpot or whatever - as a new contact or lead.

Hopefully, you're at least proficient enough to setup a workflow or automation in your CRM system that can evaluate the new record and assign it to a salesperson, send a confirming email to the visitor and schedule a series of automated reminders to both the salesperson and management

if follow-ups aren't being done. Configured quickly, it's a quick, automatic process that will ensure that nothing is falling through the cracks and every opportunity is resolved.

"Sales and marketing teams deserve to have a painless way to connect their forms to their CRM," said Aytekin Tank, founder and CEO of JotForm [in a press release](#). "We're thrilled to be able to offer this to our users."

When to Buy HubSpot, and When Not to

HubSpot is one of those sales and marketing platforms that, when mentioned, always raises questions from my clients. Is it a Customer Relationship Management (CRM) system? Is it just for marketing? The answer is both. It's an excellent, cloud-based marketing and CRM platform. But whether it's right for your company depends not so much on what HubSpot does, but what you're able to do with it.

If you're not familiar with [HubSpot](#), you should be. The company has become a very popular platform amongst mostly mid-sized firms and has shown impressive growth over the past few years. In one quarter last year, for example, its revenue exceeded \$200 million, an increase of about 25 percent compared to the same prior year period and the company now serves almost 87,000 customers, a growth of more than 34 percent compared to last year.

It does this by combining both a free CRM module and paid subscriptions for its marketing offering, which includes services that helps its customers capture and convert leads to prospects through inbound marketing activities including blog creation, social media posts, marketing automation and search engine optimization. All of these are powerful tools. But like any tool they have to be used by the right person.

Because in the end, companies that can't leverage these tools won't succeed with HubSpot. Sure, you can get their standalone CRM application for free. But this is not a CRM product. It is a marketing platform that includes CRM capabilities. Your sales team won't be the primary users of HubSpot, although they will benefit from what it does. The primary people who use HubSpot are marketers. This software - like all software - doesn't just work on its own. You don't just push a button and wait for the leads to come raining down from the sky. It needs someone driving it effectively.

So when a client asks if they should consider HubSpot I first consider who's asking the question: is it a sales manager or a marketing manager?

If it's a sales manager who's primarily concerned with managing pipelines, opportunities and activities then I generally point them towards a mainstream, more focused CRM application that has marketing capabilities.

However, if it's a marketing manager who wants to create more awareness, better engage a community and then generate leads for a sales team then I'm all-in with HubSpot, particularly because it has a decent CRM platform underneath it that the sales team can eventually use. But, if the client is just a small business owner who thinks that HubSpot will automatically spew out leads and close deals with little human effort as soon as the monthly payment begins then I

generally suggest a longer conversation about resources, goals and budget...and usually over a beer.

While not ignoring these small businesses, HubSpot publicly says that its main target is the under-served mid-market. That means - to me - companies that generally have enough revenues and employees that can afford a full-time marketing person. An independent or very small business owner - let's say with less than 20 employees - are generally not good users of HubSpot. At minimum, they could use a decent contact management system and at best a more powerful CRM system that can provide them with the ability to send out and track bulk emails and perform other basic marketing activities. HubSpot's management knows that great marketing isn't magic. It's hard work that requires much data entry, analysis, testing and failure. This doesn't get done by a push of the button. It only succeeds when there are full time people dedicated to its success.

If you're a very small business and you like HubSpot my recommendation is to instead consider hiring an outside marketing partner that uses HubSpot. It will be a little more expensive, but in the end, you'll be best taking advantage of its capabilities by letting someone more experienced and knowledgeable use that technology for your benefit. Otherwise if you just buy HubSpot yourself and you don't have those resources it'll probably just sit there.

I like HubSpot. A lot. But it's not for everyone. If you're the right kind of company, with the right kind of culture, then it can be a powerful tool. But if you have don't have the marketing resources - either internal or external - to fully leverage its capabilities then you may be disappointed. You don't want that. And neither, I bet, do the leaders at HubSpot.

Why it Matters That HubSpot Now Integrates with Shopify

When was the last time that an online merchant reached out to you after you bought something? Yeah, I can't remember either. It's curious, though, isn't it? Doesn't this seem they all should? They should and unfortunately, it's an opportunity that most ecommerce businesses seem to miss. The good news for them, and their customers, is that a few companies that make CRM products are beginning to do something about it.

One example: HubSpot. The makers of this well-known inbound marketing and CRM tool announced that its integration with ecommerce platform Shopify has officially gone live. The free integration, which was originally announced last year, will synchronize data between the two applications, create new contacts where required, and automatically generate a "new orders" pipeline in the CRM system.

The data can also be segregated based on products, deals and order history and then used for nurturing campaigns. HubSpot has also designed new campaign workflows that have been specifically tailored to the needs of its ecommerce customers such as following up with visitors that abandoned their online shopping carts. Specific reports have also been included that will offer metrics on new orders, sales, lifetime value, abandoned cart recovery and the results of marketing efforts on ecommerce customers.

“In a time when online retail giants consume the vast majority of demand in almost all industries, it's important that these small businesses have access to tools and strategies that will help them break through the noise,” Kipp Bodnar, HubSpot's Chief Marketing Officer, [said in a company blog](#). “Inbound marketing offers a solution to these challenges, helping SMBs personalize their marketing and build a brand that can stand up to the biggest competitors.”

The implications for small and mid-sized ecommerce merchants are significant - and endless. If I buy a pair of shoes online wouldn't it be nice to be offered some shoe polish a few months later? If I purchase a gift basket this Christmas wouldn't I be interested in a similar basket the following Easter? Did I lose all my friends during this period of time? OK, that's possible - but assuming that I didn't wouldn't it be nice if the online business who sold me a product that I enjoyed stays in touch, suggests other similar products and continues to nurture me for when I truly am interested in purchasing something else?

Wasn't it someone who said that the least expensive sales are the ones made to your existing customers? I don't know many ecommerce merchants who do this - and that's a shame because they're missing out on a lot of opportunities. As more and more merchants - both big and small - expand their businesses online look for a growing number of them to be integrating their CRM

applications with their ecommerce platforms to do proactive nurturing and stay one step ahead of the competition. I'm betting many HubSpot customers will.

SUGAR

SugarCRM Rolls Out GDPR Compliance Features. What About Your Vendor?

If you don't think your business will be affected by the European Union's General Data Protection Regulation (GDPR) you're probably wrong. Most of us are affected - particularly if we have CRM systems.

That's because GDPR will impact any company of any size and located anywhere - from solopreneur to non-profits to research organizations - as long as we're collecting any data about people that either reside in an EU country, or have even just visited one for a few days. "A U.S. tourist who visits Germany for one day and returns to the U.S. has rights under the law if that person used (a service like) Facebook while on the trip.," Alex Stern, an attorney [wrote on his firm's blog](#). "Organizations may still be wildly underestimating the scope of the GDPR."

The regulation, which was passed back in 2016, is designed to protect people's privacy. It requires companies and cloud service providers to comply with any person's request to erase, migrate or deliver information about them to them. Companies must demonstrate to authorities that they have policies and procedures for protecting this data and they should be communicating what they're doing to their community. If found in violation the penalties are steep - 20 million euros (about \$24 million) or four percent of a company's annual revenues, whichever is higher. The good news is that many mainstream CRM vendors are responding. The big ones, which include Salesforce, Microsoft, Oracle and Sage, have all announced new data controls aimed directly at being in compliance. Another mainstream CRM vendor, SugarCRM, jumped into the fray with their own list of GDPR-related enhancements.

SugarCRM is not re-inventing the wheel. Its new features are similar to other controls implemented by their competition. For example, the product now has a "command center" for data privacy and a new user role for a "data privacy manager" within an organization. There are new export features to more easily get information out to customers when they request and the creation of flags for when customers who specifically request that their information is not used for profiling or automated business processes.

Opt-out is now the default setting in SugarCRM for email addresses and a customer's consent to use their data is more accessible. Administrators can remove fields that are deemed "irrelevant" and new searching tools are included to help companies figure out what's relevant or not. Finally, the company has upgraded its own internal policies for securing customer data. "The latest release of our products and services will help Sugar customers to meet compliance requirements and build trust with their customer base," Rich Green, SugarCRM's chief technology officer [said in a press release](#). "GDPR is simply the most current and newsworthy

issue related to data privacy. It's likely that more regulation and legislation will be enacted in various countries.”

If you're running a mainstream CRM application at your company, chances are that your vendor has already taken steps similar to SugarCRM to ensure that the application and its database is in compliance with the GDPR. Of course, you should make sure of this by asking your vendor. However, if your CRM system is more niche, or industry-focused, or homegrown, your antenna should be raised. It could be very likely that you've got information in your database that would be subject to the new EU regulations and you need to be taking steps to ensure that you are in compliance. Just because you're located in the U.S. doesn't mean you're not subject to these new rules. Pretending otherwise could be a very expensive mistake.

A Big VC Firm Made a Big Investment in SugarCRM. Should You?

Silicon Valley-based venture capital firm Accel-KKR, who primarily invests in software and technology companies, made a large CRM investment. Its target: SugarCRM.

The nine-figure investment will go primarily towards helping Sugar double its size in the next three years. "With our extensive and global network, we will be able to introduce SugarCRM to potential customers and partners around the world," Jason Klein, managing director at Accel-KKR, said in [a press release](#). "Our holistic approach to growth, both direct and through channel partners, combined with the strategic guidance and operational expertise we provide, means we can add significant value to the businesses we work with from day one. SugarCRM is a truly innovative and ambitious company; we look forward to working together."

"Nine figures" is more than a hundred million dollars, which is a fortune for most CRM companies struggling to keep up with industry leaders like Salesforce, Microsoft and Oracle. It's also a significant investment for any venture capital firm, regardless of their size, to make in a mature company operating in a mature market. Sugar is certainly not a tech startup. The company has been around for more than fourteen years and boasts a customer base that exceeds more than two million individuals in over 120 countries who use its software in 25 languages.

"Of course, this will lead to huge benefits for our customers too," Sugar's CEO Larry Augustin told me in an email. "We already have a more than 90% customer retention rate and regularly come out on top in industry polls, but we're determined to keep improving." The company will be pouring additional funds into product development and to improve its service capabilities. Klein aims to keep SugarCRM at "the forefront" of CRM. "We see a future where businesses not only increase their productivity and efficiency through CRM, but also use AI, predictive insights and machine learning to help them outmaneuver their competition," he said.

So now that SugarCRM has received a stamp of approval - and a lot of money - from a well-known and respected VC firm, does that mean the application is worthy of your investment? The CRM market is crowded with scores of great applications like SugarCRM that are likely to meet the needs of most small and medium sized companies, particularly those that are just starting out with CRM or who don't have complex demands. Not that SugarCRM can't handle more complex requirements. But there are, however, three significant areas where the product - and the company - does stand apart.

The first is customization. While many other CRM applications provide tools to integrate and customize their systems with others, SugarCRM is one of the few that is built on an open-source platform, which gives developers the ability to more deeply design solutions in and around it. Open source certainly provides a huge amount of flexibility and control to the company that

really needs to create a specialized system for its needs. It does, however come with some drawbacks, the most significant being that making too many changes - particularly if they're outside of the toolkit provided - may impact your ability to get support or upgrade future versions. Finding the right developer can also be a challenge...and costly.

SugarCRM is also one of the few applications that continue to support both on-premise and cloud based deployments. Others - like Microsoft - have these options and there are still a few true on-premise solutions, like GoldMine and ACT, still available for non-complex small business users. But the field is dwindling. If you're still not completely sold on the benefits of the cloud, harbor concerns about security and control over a vendor's future pricing or already have on-premise systems that would be easier to integrate with another on-premise system, then you still may desire a solution that you buy outright and host yourself internally. You wouldn't be alone. I have plenty of small business clients that continue to choose this option and a few much larger healthcare and financial services firms that prefer to keep all of their data in-house.

SugarCRM gives you this option.

Finally, in an era where an increasing number of CRM solutions are delivered online with the only support coming from call centers overseas, it's nice to see companies like Sugar who offer a channel of partners (and developers) trained in the deployment and best use of their products. Maybe I say this because my firm is also a CRM partner for some of their competitors and I truly believe that without a good partner you're stacking the odds of a successful implementation against yourself.

So yes, if any of the above three needs are important to you than an investment in SugarCRM may be worthwhile. Of course, I don't know the specific plans for Sugar's use of Accel-KKR's funds, but I would hope some of it will go towards reinforcing some of these core strengths.

PIPEDRIVE

Pipedrive's LeadBooster is the Reason Why We Don't Have to Worry About AI

If you've been following CRM technologies at all the past few years you've likely been inundated with stories about artificial intelligence (AI), bots, and other ways software is doing things automatically and without human intervention. To give an example, take a look at Pipedrive's new product.

Founded in 2010, [Pipedrive](#) makes a great CRM application that's used by more than 85,000 companies worldwide. The software zeros in on providing sales pipeline management tools for small and medium sized companies that helps manage a salesperson's emails, activities, calls and other data. It also provides a way to create collaborative views of all that information so that both a team and managers can stay on top of pending or prospective deals. Just this past week, the company added to that feature set with the introduction of a new product called LeadBooster.

What LeadBooster does is to take some of the human element out of the sale process. Once implemented, visitors to a company's website are presented with customized chat boxes that asks questions with specific, multiple choice answers (which of course are created and customized by the company). Because those answers leave little room for interpretation, the website visitors' responses can then be evaluated and replied to with solutions, suggestions or even more questions to find out additional information. The technology is smart enough to not only gather information but check calendars and confirm if a salesperson is available so that it can help the visitor schedule a call. It's all done through chat and as if another human being is on the other side. But it's not a human.

It's a robot. It's artificial intelligence. It's software that is handling tasks that humans once did. You know why.

"When it comes to web visitors, slow response times can kill a potential deal," Vinay Ramani, chief product officer at Pipedrive, [said in a statement](#). "But responding quickly is not enough. To make the best use of their time, salespeople need a fast, efficient way to qualify leads. Automating initial contact with web visitors to qualify them, and directing just qualified leads to salespeople, ensures that businesses respond quickly but that sales teams don't waste time pursuing unqualified leads."

I get asked a lot about AI like this. Some business owners and executives are concerned that if they're not investing in this kind of stuff, their company will fall behind. They're right to have this concern and so should you. But LeadBooster is just one of many examples of why you shouldn't worry about the investment. Let your software vendor worry about it.

That's because good technology providers - like the people at Pipedrive and many other CRM software companies - are making the investment. They're doing this because they're all in competition with each other and not having the latest AI feature is like two girls showing up to the prom in the exact same dress. Mortifying!

Pipedrive's AI features in LeadBooster is likely the tip of the iceberg. As AI matures you can expect to see many other uses in CRM applications ranging from voice recognition and synthetic voice responses to generating automatic email campaigns based on certain trigger activities without a marketing manager's involvement.

All of this will save time and make your staff more productive - and all of this will be done on someone else's dime, so don't worry about spending any money here. Your job is to not shy away when these features and add-ons are introduced but rather embrace them. All that your software vendor (and their investors) will ask is that you keep paying those monthly fees.

Oh, you know why.

Is Pipedrive Really the "Easiest to Use" CRM? Really?

News from Pipedrive: they're the easiest to use customer relationship management application. Do you believe that?

I certainly believe one thing: [Pipedrive](#) is an excellent CRM application. It's used by tens of thousands of sales teams in almost 200 countries – including many of our clients - and has a unique and powerful methodology for tracking deals and opportunities which incorporates collaboration and automated workflows so that that nothing gets lost in the cracks and revenues are maximized. You've probably figured out that I'm a fan.

But "easiest to use?"

That claim comes from a recent report published by research and review platform The Blueprint. According to a [press release](#), The Blueprint evaluated nearly 700 CRM solutions and focused on the solutions that "really made sense for small and medium sized companies" that offered "budget-friendly structures" and gave "preference to those that also offer fully functional free trial options." A narrowed-down list was evaluated by an independent CRM expert to pick the "easiest to use."

According to Craig Borowski, Managing Editor of The Blueprint, Pipedrive won because of its "robust free trial option, multiple generously priced subscription tiers and a streamlined and intuitive UI in one very attractive, polished package." His company's review said that "Pipedrive is economically priced, ridiculously easy to use, and is made by sales experts, for sales experts" and that "just about any small business owner who generates leads, closes deals, or sells services could make wise utilization of Pipedrive."

A software application's user interface is extremely important. In fact, when asked what the number one question I usually receive from SMB clients evaluating CRM applications it's almost always about ease of use. Everyone wants something that's user friendly. But unfortunately, that's an impossible question to answer. In fact, whenever I get asked if a CRM application is easy to use, I always say: "You tell me."

My company implements more than a dozen CRM applications. I can take any one of them and line up ten clients who say that it's "easy to use." But then again, I can just as quickly find ten others who think that same application isn't user friendly at all. That's because no one can agree on whether or not a software application is "easy to use" no more than we can agree on whether *The Irishman* was a good movie or not. Some people thought it was one of the best movies ever. I thought it was just OK. But then again maybe I need to see it a few more times.

The same goes for CRM applications. Ease of use is a state of mind. Of course, you want an application's interface to be user friendly, but that definition varies as much as the age and experience of the users using the application. You can't make a decision as to what CRM is best for your company based on whether or not it's the "easiest to use." You need to instead focus on the features of the application, the partner you'll be working with and the community of the vendor that will be supporting it. Trust me when I say that if you're happy with those things, your people will get used to using the application.

So, is Pipedrive really the "easiest to use" CRM? Perhaps. Perhaps not. What matters is whether the investment you make in this tool will return itself by way of more sales, productivity and ultimately profits. If you're happy with those numbers, you'll be happy with the application regardless.

Pipedrive Makes 400 Million Leads Available, Because it's All About the Data

In the end, and regardless of what all the vendors of customer relationship management software say, these things are just databases. Plain and simple.

Sure, there are features for managing leads, opportunities, services, marketing, emails and activities. But they all rely on data. Good data. It's the data that drives the value of a good CRM system. But when it comes to the data there are generally two big problems.

The first is managing it. That's because a database needs care. It needs administration. It needs oversight, reviews, controls and processes. Your CRM database, if it's to be useful at all, need to be accurate and complete. Key information shouldn't be missing, out of date or incorrect. My best clients have people that are responsible for this data. They ensure that rules are followed. They check up on the employees entering data into the system. They train, they automate, they control their systems closely. They know that only with good data can management get the analytics and metrics needed to make decisions. And only with good data can workflows and artificial intelligence be relied upon to automatically perform actions and communications that will save time and increase profitability.

But this column isn't about managing data. It's about the second biggest problem: finding data. And that's where Pipedrive comes in.

[Pipedrive](#), a popular CRM application geared towards small and mid-sized businesses, introduced a new lead management toolset called Prospector. It includes a highly customizable chatbot that engages with web traffic 24/7, assists live chatting so that sales reps can qualify leads in real-time, offers web forms to capture lead data and an add-on called Web Visitors for monitoring web activity. That's good. But the real value here is something else. Prospector also comes with data. Lots and lots of it. 400 million business profiles, actually.

Why? Because most businesses (including mine) struggle with finding new business. A lead management system is great. But it's not very helpful if there are no leads to manage. "Research shows that prospecting and lead qualification remain the biggest challenges that sales professionals face every day," Krishna Panicker, VP of Product, Pipedrive says in a [company release](#). "While using technology for sales and lead generation has a direct correlation with sales success, many sales professionals are not using technology for lead generation. We want to change that and help sales teams find and close more deals with the best tools for leads." Pipedrive's own data says that their customers need...well...data. Their annual State of Sales survey of 1,000 sales professionals revealed that more than half (54 percent) struggle with finding sales leads and that nearly half of the leads they find are actually generated by

salespeople themselves. 55 percent of companies think that sales reps need to improve their ability to incubate promising leads for the future.

Pipedrive isn't the only CRM platform doing this. Others, like [Salesforce](#), [Zoho](#), [HubSpot](#) and [Microsoft Dynamics](#) have also, in the past few years, been offering the ability for their customers to acquire lead data from top lead providers like [ZoomInfo](#), [InsideView](#) and [Lead411](#). These options have been available through separate integrations and add-ons but I'm expecting in the not-too-distant future the data will be a standard part of a CRM implementation's offerings and that every mainstream CRM application will have this resource.

The lead database industry has been, for years, fragmented and in many cases lacks credibility (I get dozens of spam emails every week from dubious firms offering data to buy). Now, many CRM vendors are realizing that just providing a platform nowadays isn't enough to guarantee the success of a CRM system. The more and better data that goes into that platform, the more use the system will receive and the more features will be leveraged. In turn, that means the continuation of monthly fees from happier subscribers.

The takeaway is that, when evaluating a CRM system, it's not just about the features anymore. It's about what's going in to it. The best vendors, like Pipedrive, who offer lead data will always stand apart from those that don't. If you're a prospective buyer, the opportunity to receive lead data from your CRM provider should be an important consideration before you move forward.

VERTICAL CRMs

Does The World Need A CRM For Car Washes?

There exists a customer relationship management application called [Rinsed](#). It's aptly named. Rinsed is a CRM for car wash operators. Wait...a CRM for car washes? Can you believe that?

You would think that such a niche product would have a hard time getting financing. Turns out this is not such a niche. The car wash market size is about \$15 billion, which is why Rinsed was able to not only grab an initial \$3 million seed round, but also close last week on a \$12 million a Series A venture capital deal.

So what's so special about Rinsed?

According to the company Rinsed helps car washes of all sizes "delight their customers and grow their subscription revenue." It manages all your customer interactions in a single place, from customer support tickets, to outbound email and text marketing. It helps "retain more customers, and grow membership revenue."

When clients ask me about vertical - or industry specific - CRMs I generally poo-poo the idea. For me, a CRM is all about people and if you're doing business with people than any mainstream application, with a little customization should usually be fine. I'm also wary about niche players because they oftentimes lack the resources, community and support infrastructure of their bigger competitors.

But reading about Rinsed has changed my mind a bit. Why? Because I must admit if I were operating a car wash I would probably want a CRM for car washes. Yes, a mainstream app could be configured to do that. But a vertical application like Rinsed seems like a better, easier choice and for a few reasons.

For starters it comes out of the box with an ecommerce platform already configured for a car wash and enabled to handle online checkouts as well as track both visits and conversions and support credit card payments. Just as importantly it automatically integrates with many of the popular point-of-sale systems used by car washes and is configured to setup memberships and subscriptions, which has become a critical revenue model for the industry. And, of course, it comes with analytics and reports specific to the industry.

"We are empowering operators with best-in-class subscription management tools built specifically for the needs of the car wash industry," Austin Esecson, the company's CEO and co-founder said in a [press release](#). "As the car wash market shifts to a subscription model, the problems faced by operators now extend beyond the driveway to encompass every interaction the wash has with its customers and subscribers."

Can all of this be done with a Salesforce, Zoho, Dynamics or other mainstream CRMs? Yes. But it would take some customization, perhaps a little development and certainly integrations with other third-party products. That means more time and money...and ongoing maintenance. But then again, the chances of one of those companies folding up and going away are pretty remote. That's a pretty big deal, particularly if you're a smaller operator who relies heavily on its CRM as a core business application.

Which means that if you decide to run your car wash on a platform like Rinsed, you're also taking a risk of whether or not Rinsed will continue to be around for a while. But this hasn't stopped the more than 300 car washes that the company says are its customers. And one thing's for sure: when you partner with a niche CRM provider you'll certainly have more of an influence on its future development plans.

So should you go with an industry-specific CRM like Rinsed? In the end, you'll need to look beyond just its features and functionality. You're making an investment and starting a partnership. You'll need to decide whether or not you believe in the company's model and trust both the leaders and the investors of the CRM platform that will be so significantly important for your business. Rinsed's VC investors certainly trust them.

"The Rinsed team combines deep car wash expertise with experience building scalable technology products," Eric Stromberg, co-founder and Managing Partner of Bedrock Capital. "We first invested in 2020 shortly after the company was started. Given the speed of execution and rapid growth since, we are thrilled to double down and lead the Series A."

Bedrock Capital did their due diligence. Before taking a shot at a niche provider, do yours too.

It's High Times for Cannabis CRM Solutions

It's not just cannabis dispensaries that are benefitting from the nationwide trend towards marijuana legalization. Pot growers, real estate developers, equipment makers and many service firms are sharing a piece of the multi-billion-dollar industry. And let's not forget technology. There are now many point of sale, inventory, processing, warehousing and order entry systems that are tailored specifically for companies in the cannabis business. CRM systems too. What's so special about the CRM software made for the cannabis industry?

There's regulation. Some states, like California, Colorado, Washington and Oregon require growers, warehouse, dispensaries and labs to submit detailed reports of customers, production and sales. "There's no software out there that any of the big companies have made that really works for our industry," Chris Dell'Olio, CEO and co-founder of Los Angeles-based WebJoint [told TechTarget](#). "I realized that there needed to be technology in place for these guys because, sooner or later, it's going to be a requirement." CRM applications like WebJoint have customized data tracking and reporting features that comply with the widely-varying state and local rules. Cannabis users are also a very diverse group. Some customers may need to submit prescriptions and have specific medical needs. Recreational customers vary from those looking for specific strains that they love to the occasional user who's looking to try new products. Some customers may prefer oils. Others may like edibles. There are one-time shoppers and regular buyers. This is all information that a typical dispensary should know to best serve its community.

The good news for cannabis firms: a host of CRM applications are aiming (and succeeding) to address those needs.

Besides WebJoint, other CRMs designed specifically for the industry, like [Baker Technologies](#), Soro and PipelineDeals offer standard functionality like communication, lead, pipeline and campaign management tools as well as the ability to track customer activity, preferences, promotions and offers. While Soro and PipelineDeals focuses on the issues unique to growers and processors, both WebJoint and Baker also integrate with their own brick and mortar point of sale and ecommerce systems.

But to me, the question is: do marijuana businesses really need a CRM system customized for their industry? Is it really that special? The answer is...maybe.

I'm not a big fan of vertical, or industry-specific, CRM systems. Usually, their price points are higher than typical mainstream systems, particularly the ones geared towards small and medium-sized companies. More importantly, I don't think these systems offer that much more in the way of benefits that usually can't be address with a few customized fields, reports and

workflows that would require minimal effort to configure. Plus, the larger, mainstream systems tend to have a wider support base and service community.

But, then again, maybe a vertical CRM could be the better answer.

If the cannabis retailer already owns a vertical point of sale, processing or order entry system like the ones mentioned above then to me it makes the most sense to just add on their CRM modules because it's easier to integrate their data. It's likely too that these applications won't be nearly as powerful or feature-rich as mainstream applications. But you know what? They may just be good enough. Maybe the cannabis firm just wants to have a way to collect information about their customers and send mass messages to them once in a while offering deals. Maybe just a few key reports, alerts and reminders will suffice. Maybe there's no real need for advanced opportunity management, complex marketing campaigns or a way to collect support issues from the field. If a business has very basic CRM needs and their application provider has a decent add-on, then getting that vertical CRM may make sense.

Besides, as cannabis continues to extend its reach nationwide you can bet that the technology companies making these applications will mature along with their customers.

A Simplified CRM for B2C Small Businesses Leverages 200 Million Consumer Records

According to Toby Scammell, the founder of Womply, most small companies are being left out of the CRM party – a \$40 billion party that’s been growing in corporate America at a 16 percent annual clip.

"Small businesses, especially mom-and-pop shops, can't use traditional CRM systems," he wrote [on Medium](#). "Unlike other businesses, these types of companies don't know who their customers are and can't easily collect customer information. Therefore, they can't use CRM, and they miss out on tremendous benefits as a result."

The problem, he notes, is that many of the most popular CRM systems are too complicated and collecting data, particularly in a physical store environment, is too difficult for most merchants. He's right about that. I have clients – particularly retailers - who have tried VIP programs, loyalty clubs, newsletter lists or just a simple "what's your email address" query at the register with mixed results.

So Womply, a company that already provides reputation management, marketing and business intelligence services and boasts more than 150,000 small business customers, this past week released a CRM product targeted directly at the B2C small business owner. The idea is to provide those businesses with easy access to data on more than 200 million consumers that's being updated behind the scenes using "millions of data points" according to a [company press release](#).

Scammell says that the company aims to fix a few core problems that these businesses have. "They don't know who their customers are, beyond a handful of regulars, they struggle to collect and append contact information, transactions, and communications history to customer records and they have difficulty segmenting customers for marketing campaigns," he writes.

Womply CRM aims to be simple. There's no installation or setup required. There's no complex calendaring, opportunity management, forecasting, service tickets or most other features that most other CRMs provide and for which most small businesses never even take advantage. Instead, when you sign up you get a ready-to-use CRM system complete with 200 million customer records. The system only comes with just three main functions: the ability to create and/or update those already existing records, the ability to append those records with transactional data from the company's systems as well as from outside sources and then the ability to use that data to send targeted marketing messages.

Yes, it's a purchase of data but it seems more than that. Instead of a spreadsheet it's data that's already housed in an easy-to-use CRM and marketing system and the data is being continuously

updated. That's it. And you know what? Based on my experience with most of our smaller clients who use maybe 20 percent of their existing CRM systems...that's probably enough.

Redtail is Now Using AI to Make Financial Advisors (and the Rest of Us) Better

When our CRM clients ask if they should be investing in artificial intelligence, I always tell them to hold on to their money and be a little patient. That's because if they're using a good CRM system then in all likelihood their CRM vendor is already making that investment. Redtail Technology is a good example.

Redtail, which was founded in 2003, provides web-based Client Relationship Management applications to the financial services industry. The company announced a series of new artificial intelligence features that its applications will include that financial advisory firms can use to provide better and more accurate services for their clients.

The idea is to measure client communications in order to identify service or compliance problems, concerns or questions from clients and then suggest solutions to their advisors. It's not unlike how H&R Block is leaning on IBM's Watson to research millions of lines of tax code in order to come up with the best treatment for tax issues. Redtail's AI functions will do a similar research exercise to come up with the best solutions for managing a client's money.

"Given the volume of data typically required for a machine to start learning, this level of artificial intelligence has only been available at large institutions – until now," Redtail CEO Brian McLaughlin said [in a press release](#). "What's most exciting about this rollout is that Redtail has democratized access to AI to create a more intentional, informative process by which advisors at any firm can interact with their clients."

The technology will analyze and categorize incoming communications – i.e. email - based on the sentiment of a client's message. It will identify key phrases, keywords and patterns and then make recommendations to the financial advisor based on data from 70 million individuals, 1.3 billion filtered emails, 50 million notes and 450 million activities that have touched Redtail's system, according to [a report in Wealthmanagement.com](#). The advisor is then alerted, based on what's been learned, to reach out to the client with recommended support. Don't worry, no automatic emails will be sent to the client. We're not so trusting of this stuff...yet.

The idea is to make a financial advisor as smart as possible by doing all the research for her based on a client's concerns. Better (and quicker) answers make for happier clients, right? "You know a lot of things, but you miss that one little detail, that one critical component," McLaughlin told Wealthmanagement.com. "That's what AI should be helping with." He's right. Professionals can't know everything. But with AI doing all the heavy lifting, the playing field is levelled. It's good news for people in the financial services industry. But if you're a manufacturer, distributor, landscaper or just a freelancer, don't feel left out.

What Redtail is doing with artificial intelligence is only the tip of the AI iceberg for all industries. Today, it's reading emails and making internal recommendations. Within a few years your typical CRM software will be able to receive phone calls, gather data and carry on full conversations on specific topics with customers and clients before escalating the call to a human being. More work will be done with less people, which means that your people can be put to better use.

Like Redtail, most of the mainstream CRM vendors I know are investing millions into creating similar features and for all industries. Businesses don't need to worry about making investments in artificial intelligence. Your CRM system likely includes some of it already, or will in the very near future. As an end-user your job will be to understand the benefits (and the risks) so that you can use this technology in the right way.

SignPost Raises \$52 Million to Help Small Merchants Get More and Better Online Reviews

We love our dog.

So much so that I overpay for "nutritional" food, "all-natural" snacks and "safe" toys. I don't know if any of these claims are true or if these things make a difference. But only the best, you know?

My wife and I buy all this from a great local pet store. But as great as it is we would spend even more there. Yes, we're suckers. A great new toy to make him happy? Sure! A grooming? Why, I didn't know you even did that! Anal gland expression? Hey, why not! Oh, you mean for the dog? Uh, sure, that too!

All of these products and services are offered by our local pet store. But here's the thing: we don't know about them. We don't hear from them unless we physically go to the store. If we did, we'd go to the store more often. We'd spend more money. And what about all the other people who may want to check them out but can't find out much online? Why doesn't the store owner make more of an effort? Is she independently wealthy? Maybe. Maybe not.

Companies like [Signpost](#) are trying to make this kind of marketing easier for the small merchant through CRM. And they've just raised \$52 million to aid their efforts.

Signpost's system, when setup, automatically imports all of the names and contact info of the store's customers from their point of sale, phone and email systems and continues updating as new purchases are made. It then tracks history, interactions and preferences (our dog is a little Yorkshire Terrier with a big personality). That's the first part.

The second part is true CRM. If we haven't come in for a while, we may get a gentle text or email. If there's a gap in the grooming schedule we may get alerted. Or if we're up for a new grooming we'll get a reminder. If something special comes in that a small dog may like we may get offered a promo coupon. Hey, we may even get a holiday card with a cute looking Yorkie (but not as cute as ours) thanking us for our patronage.

But the most important part of Signpost's technology addresses what I think many CRMs ignore: online reviews. When we buy from the store, we'll get a text asking us to rate the store at Google or Yelp or some other online service with direct links to do so. We give it five stars with a nice comment, people see that and more customers show up. My nice comment gets noticed by Signpost, the store is notified and now I'm a "favored" customer that's even more loved (oh, and asked for a referral or two).

Signpost is one of a growing number of CRM apps targeted at the small merchant. But the company's emphasis is using its CRM capabilities to improve the number and quality of online reviews customers give.

“The turnkey setup and level of automation in Signpost’s platform, as well as their ability to follow through on reviews and engage the modern customer well beyond their first interaction is what really sets them apart,” Brian Peters, Managing Director at HighBar Partners, one of the investors in the latest fundraising said in [a press release](#). 82 percent of smartphone shoppers "conduct ‘near me’ searches and 90% are likely to click on the first set of results and of those, 76% call or visit the business within 24 hours.

I've never been asked by my pet store for an online review. If I was, and the process was easy, I'd do it. Yet that one review could be a significant financial help for the store's owner. She shouldn't worry - my wife and I will always keep shopping there. But without a CRM like Signpost who knows how many other customers would be as loyal, or even find them in the first place?

CRM Startup Element451 Wants to Help Higher Education Solve a Big Problem

Many universities in this country have a big, big problem. It's a significant decline in enrollment and it's being caused by two big factors.

The first - and most dramatic - is demographics. Due to declining birthrates (the 2009 recession didn't help either), there's simply less people graduating high school and applying for higher education and the news isn't getting better: the problem is expected to become even worse in the next few years.

The second is simply money. Colleges - particularly private colleges that now charge upwards of \$50,000 per year are just too expensive. Some large employers - from Google to Facebook - are reportedly bypassing college requirements in their recruiting efforts because they're realizing that many smart people just can't afford to go. Other potential university applicants are turning more to community colleges, technical schools and the trades.

"Some less selective colleges missed their targets by 25% or more this year, John C Bravman, the President of Bucknell University [told The Philadelphia Inquirer](#). " We [colleges] are being questioned as to our core values, our purpose, our efficacy, as well as our cost."

This is an industry with a big sales problem – and it's only getting worse. While that's bad news for some, it does present an opportunity for companies like Element451. The startup - which just received \$1 million in seed funding - is building a CRM system specifically geared towards college recruitment.

This isn't a new concept. In fact, there are plenty of other CRMs that are geared toward higher ed. So, what makes this one so special? "Element451 is different from other higher-ed CRMs because it makes efficiency-boosting technology like marketing automation and predictive analytics easy to use," the company's founder and CEO Ardis Kadiu said in [a statement](#). "The front-end experience for prospective students is also more akin to consumer sites and apps." The obvious question if you're a higher education recruiter or marketer is why not just go with some of the brand names like [Salesforce](#) or [HubSpot](#) to do this. They have similar features, right?

They do and the answer is yes, marketers and recruiters can surely take a mainstream CRM and customize it to their needs. But that will take some work to do. They'll surely want to create lots of specific fields and make sure there's not only a good office interface but an easy to use web front end for candidates to submit applications and check on their status. There will be all sorts of setup considerations such as security, connections between related parties and reporting. There

will also need to be specialized workflows that are best configured for an audience that includes students, parents, schools and counsellors.

Kadiu is betting that many college administrators don't have the time, expertise or budget to do all that. "Most other CRMs require coding ability. Some even a technical staff member dedicated to managing the platform," he says. "There's zero code to learn with Element451 so current staff can use it after just a few days of training. This makes it much more cost-effective."

He's probably right about that. I'm sure there will be some who prefer to build their own systems or customize something more mainstream. But there's definitely a market for higher education organizations that just want to take something at least close to what they need and get it up and running fast.

Regardless of what's decided, one thing's for sure: Element451 is certainly in the right space. It's clear that colleges and universities are already dealing with an enormous sales problem which is only going to get worse over the next decade. The smartest managers at these institutions will understand the need for a good CRM system to help.

OTHER CRM PLAYERS

Google Now Offers A Powerful CRM Function...For Free

Google has quietly added a feature to its Business Profile listings that can give any business, regardless of their size, a powerful CRM function. And it doesn't cost a thing.

First, let's make sure you're aware of the Google Business Profile. This is the place where you can setup information about your business so when people search for you they get this information displayed on the right side of their search results. I'm sure you've seen this before with other businesses you've searched.

For example, if you search for my company (The Marks Group) you'll see our address (we're a virtual company, it's a post office box), hours, health & safety information (our post office box is very clean) as well as our phone number and reviews (mostly good). There are also links to our website, directions to our location (in case you want to meet in front of our post office box) and the opportunity for visitors to call us directly from the Business Profile web page. Good stuff. Every business should have this. If you don't, you can setup a Business Profile for your business [here](#).

But let's turn to customer relationship management. When you purchase a mainstream CRM system you'll want to integrate it with your website so that you can capture leads. You may also want to setup chat functionality to answer questions. Better yet, you may want to leverage AI so that standard or common questions are automatically answered, which saves everyone a lot of time. This is standard CRM stuff and if you're not doing this you should be.

But now Google is offering a new function that will help accomplish these tasks, even if you don't have a CRM system. The company has quietly expanded its Q&A capabilities in its Business Profile.

According to search engine optimization (SEO) publication [Search Engine Land](#), this was noticed by SEO professional [Stefan Somborac](#). The function will allow you to create up to ten FAQs with questions of up to 40 characters and answers to up to 500 characters. You can also include links to your website.

This is a powerful CRM function...and it's free. By setting up your questions you can capture visitors Googling you and direct them to where you want. Not only are you providing helpful and immediate answers to prospects but if you configure your responses the right way you can capture their lead information too by offering them some type of call to action on your website, like a whitepaper, brochure or other type of asset. And once the prospect has given up their contact info on your website you can (hopefully) have your CRM configured to capture that data too. Even if you don't have a CRM application you can still receive this information by email.

To enable automated FAQs for your Google Business Profile, Search Engine Land's Matt G. Southern says you should follow these steps:

-Search for "my business" in Google on a web browser.

-Click Customers and then Messages.

-Click Menu, and then Message settings, and then Manage frequently asked questions.

-Click +Add a question

I'm jumping on this CRM feature right now. You should too. Happy hunting!

What Is Conversational CRM? And Why Should You Care?

Another year, another CRM buzz-phrase.

Every few years the customer relationship management industry seems to come up with buzz phrases to try and generate enthusiasm. Back in the day it was "Sales Force Automation." Then "Social CRM," "Collaborative CRM," "Operational CRM" and "Analytical CRM."

Just this month CRM and service desk platform Zendesk [announced](#) that it is unveiling new solutions "that put conversations at the center of customer relationship management." The company's new tools promise to better roll-in communication and collaboration services into its core CRM offerings as part of its push to be better at "Conversational CRM."

Conversational CRM? Is this just a gimmick? Should you care? You should. Because Conversational CRM isn't a complicated thing. But of all the buzz-phrases, it's actually – at least to me – the most meaningful. Why? Because it's lacking in most CRM applications.

Conversational CRM is easily defined. It's basically just the bringing together of all conversations into a CRM system. So if you or your customers are using text messaging, Slack, WhatsApp, Facebook Messenger or any number of messaging platforms, all of these messages would theoretically arrive in the same place and then get connected to the people or accounts involved. Ask any CRM user and they'll tell you that this isn't happening right now.

Right now most CRM systems just integrate email systems out of the box. That's fine, but this is 2022, not 2012. People use many other ways to communicate other than email. We text, we chat, we message. But unfortunately, those conversations aren't making it into our CRM systems. Can you go to a contact in your CRM system and communicate using the platform they prefer, other than email?

Probably not.

Sure, there are some third-party integrations that connect messaging, text and chat platforms to CRM systems. But they come with the headaches that any 3rd party software brings: spotty support, broken connections and lack of resources. Plus, to really communicate over multiple platforms you'll likely need multiple third-party applications and that becomes a mess.

Shouldn't this be included as a core feature of your CRM? Of course it should. All of my client conversations should come directly into my CRM system, regardless of the messaging platform they're using. I should be able to initiate those conversations right from my CRM too. And I should have the ability to mass communicate with groups of clients and prospects on their preferred messaging system right from my CRM platform, assuming they give me permission of course. Right now I can't. Neither can you.

[Zendesk](#) is starting to do something about this. Right now the company seems to be focusing on WhatsApp and Facebook Messenger and is providing other tools for developers to bring in more apps on their Sunshine developer platform. The company wants to help its customers create custom bots to handle common issues, route relevant conversations to the right people, and analyze these conversations better.

5 Reasons to Buy Zoho CRM

At The Marks Group, we sell and implement five Customer Relationship Management (CRM) applications and currently serve more than 600 companies who use these applications to increase their sales, improve customer service and grow their profitability. A good CRM system, when implemented properly, will ensure that important tasks are never falling through the cracks, critical information is being shared by everyone in your organization wherever they are and the value of your company is increasing.

This whitepaper is about Zoho CRM. Zoho CRM is made by Zoho Corporation. Like the millions who already use this great product, it may be right for your company. If you're seriously considering Zoho CRM, then let me share these five reasons why you should consider buying it, based on the more than 90 clients we serve who have already purchased it.

1 – It's very affordable

Zoho CRM has a free version with limited capabilities. But its full-featured Enterprise version is only \$35 per month per user. I like to call Zoho CRM the “poor man's Salesforce.com.” This is not a knock on Zoho. It's just that the cloud-based application includes most, if not all, of the features and functionality that's commonly used by our clients who have anywhere between two and fifty users. We sell and implement Salesforce.com and it's fantastic – but it's pricey and in many cases overkill for our typical client. For Zoho CRM's base price you get many functionalities (i.e. service, marketing) that would cost extra in Microsoft Dynamics and Salesforce.com With Zoho you get a lot of bang for the buck.

2 – The mobile application is great

We use Zoho CRM in our company. Last year I was on a family vacation and my laptop died. For almost a week I was forced to conduct my business, stay in contact with my office, follow-up on certain matters – all from my smartphone using Zoho's mobile applications. And I never missed a beat. Zoho CRM has a fully featured mobile app for an iPhone or Android that contains most of the capabilities in its browser-based CRM product – from opportunities to account management. Its separate e-mail application integrates deeply with the CRM system so I never had to worry about my emails being saved in my company database. Both mobile apps are free and downloaded from the Apple or Google stores.

3 – There are great third-party products

Zoho CRM is a cloud-based application and the company has established partnerships with most of the other leading cloud based business applications available today. For example, there are

integrations with MailChimp for bulk emailing, QuickBooks Online and Xero for accounting, ZenDesk for customer service and many others. Zoho also works well with Zapier, Workato and other cloud-based integration tools. Zoho synchronizes well with Microsoft Outlook and Office 365 but it's also strongly intertwined with Google's business apps too.

4 – It belongs to a powerful suite of products

Zoho is unique in that its CRM application is just one part of a broad suite of business applications that the company offers to handle every part of your processes. Zoho offers its own tools for accounting, project management, invoicing, help desk, website creation and email – and many, many others. The Zoho suite of products integrate well with each other and the company wants it to be your only platform for doing all of your work.

5 – You can customize just about anything

Even though Zoho is much less expensive than other enterprise tools, it does not lack capabilities or customization. As you would expect, Zoho allows the complete design of all forms, views and fields. You can restrict data views and updates by user or group. You can add and remove modules. You can design specialized lists and add as many fields as you please. Using its' own built in features or adding on Zoho Creator, we've been able to build entire new modules for clients that help them manage inventory, organize equipment and fixed assets or track vehicle maintenance. Most importantly, Zoho is user-friendly enough to learn how to do this on your own (or with educational materials they provide) so there's no requirement that you use a firm like The Marks Group – unless, of course you have better things to do!

The Bottom Line

We recommend Zoho CRM to companies with these characteristics:

- a need for a fully cloud based CRM application
- a smaller user group (about two to fifty people)
- a smaller budget and less need for extensive customizations/integrations
- a need to integrate with other cloud-based apps out of the box
- less reliance on Microsoft Outlook and other Microsoft products.

If these characteristics fit your description, then Zoho may be the right choice for you.

5 Reasons to Buy GoldMine

At The Marks Group, we sell and implement five Customer Relationship Management (CRM) applications and currently serve more than 600 companies who use these applications to increase their sales, improve customer service and grow their profitability. A good CRM system, when implemented properly, will ensure that important tasks are never falling through the cracks, critical information is being shared by everyone in your organization wherever they are and the value of your company is increasing.

This whitepaper is about GoldMine. GoldMine is made by HEAT Corporation. GoldMine has been around for decades and it was the first CRM we sold – going back to 1998! It was once one of the leading contact management applications and extremely popular with small businesses. Although many have migrated to cloud based applications, the product still commands a very strong niche among companies that desire good, on-premise contact management and CRM. Like the many who already use this great product, it may be right for your company. If you're seriously considering GoldMine, then let me share these five reasons why you should consider buying it, based on the more than 90 clients we serve who have already purchased it.

1 – It's on-premise

Yes, it's been cloud, cloud, cloud – that's all we hear. And the trend is going to continue. Most new applications will be cloud based because it's a better revenue and support model for the technology industry. But HEAT Corporation has resisted this trend and has positioned GoldMine as a great application for those that don't want a cloud application. These are companies that already have a reliable, secure infrastructure in place with good IT support and a "if it ain't broke, don't fix it" mentality. It's a good mentality and GoldMine fits right into this niche. You buy it, stick it on your server and away you go. If this sounds like your company than an on-premise application like GoldMine is right for you.

2 – The price is right.

Sure it's debatable, but when you do the math it seems pretty clear that an on-premise application just cost less over time. Here's an example. A 5 user GoldMine is a one-time purchase of \$3,000 (and that's five concurrent users, not named, which means that you could have dozens more users listed on the system but only five are allowed to login at the same time). If you subscribe to a typical cloud-based CRM application for \$25 per user per month then your annual cost of a five-user system is \$1,500 per year. So, after two years, a cloud based system starts costing more than the one time cost of an on-premise system like GoldMine.

3 – It's fast.

I've used GoldMine for many years and I've also used a few cloud-based applications and there is no question that GoldMine is faster – mainly for two reasons. First, it's an older product that's data entry driven that relies more on a keyboard than a mouse. If you're a fast typist you're not delayed when you have to use a mouse as much as you are when you use a cloud-based system. Also, GoldMine is not on the cloud and not subject to slower connections that we all experience while travelling or at places with poor Internet speed. Performance is just quicker over a local area network as opposed to a wider, web-based network.

4 – You can go offline.

Most cloud-based applications don't offer any offline access which means that if you're not in the cloud, or suffering with a poor Internet connection, you're going to be out of luck. GoldMine has a powerful synchronization feature that allows users to copy their entire database to a local device (laptop, etc.), do work and then sync it back up to the main system when done.

5 – It's a very strong contact manager.

GoldMine works best when users understand its limitations. No, it's not a full-blown powerful, customizable, scalable customer relationship management system. But if you're looking for a very strong and advanced database that's contact focused, fast and easily learned than GoldMine is right for you. I've found that many of our smaller clients only need this type of functionality to take them miles ahead of where they current are and for this reason GoldMine is a great choice.

The Bottom Line

We recommend GoldMine to companies with these characteristics:

- Prefer an on-premise system as opposed to a cloud based system
- Are price sensitive and only want to pay one time for their software
- Have a small (less than 20 user) workgroup
- Desire a strong contact management system and generally have nothing in place

If these characteristics fit your description, then GoldMine may be the right choice for you.

SAP Jumps Back Into CRM and There's a Big Reason Why Your Company Should Care

Most of my clients are small or medium sized companies and are generally not SAP customers. It's not that SAP doesn't offer good solutions for this market - they do. But let's face it: the company has built its very existence on large scale software for large scale enterprises and implemented by large consulting firms like Accenture and the big four accounting firms.

But last year the enterprise software giant made an announcement that affects companies of all sizes.

At its annual Sapphire Now conference, the company's CEO Bill McDermott announced a new product suite called SAP C/4HANA - a new set of CRM software and tools that will integrate with its existing S/4HANA financial applications.

The software sounds exciting - and daunting. Bringing together a bunch of recent acquisitions, the company promises the approximately 8,300 customers of S/4HANA that its new CRM tool will focus not only on just the customer, but the entire supply chain by connecting data from multiple sources and giving users a full view of customer information regardless of their responsibilities in the company. It will use machine learning and include capabilities for sales automation, marketing, commerce and customer service. The company is hoping that its CRM capabilities can, in future, be rolled out to work with its other product lines.

Many experts correctly see this as a direct attack on Salesforce.com, who over the past decade has upended SAP's once-stronger market position in CRM with its more flexible and scalable cloud-based tools. But SAP's re-entry into the CRM space is also an indication of a growing trend that should be noticed by leaders at companies of all sizes: vendor brands usurping product brands.

When clients ask me what CRM product is best for them, I usually tell them to not spend as much time evaluating features in lieu of considering the software vendor. Who is their community? How committed are they to CRM? What other applications do they provide? How does their CRM system integrate with those applications?

The cloud is steadily turning applications into commodities. Most CRM products can pretty much do the same things and if one does something that the others don't then just give it a few days and there'll be parity. Cloud based tools are making it easier to integrate data and customize

the delivery of information. So, don't worry so much about the features, I tell my clients. Instead, worry more about the vendor.

The question isn't whether C/4HANA is the right product for your company. The more important question is whether SAP is the right vendor for you. Or Microsoft. Or Sage, NetSuite or Intuit. Software companies don't want their customers using other software companies' software. They want to keep these customers completely in-house when they can.

Microsoft no longer sells separate financial and CRM products. It now just sells Dynamics. Sage sells its Business Cloud. Netsuite and other cloud accounting software makers have CRM modules that meld into their core financial offerings. Of course, there are powerful stand-alone CRMs. But for the user, there's a choice: get one of those potentially, more powerful stand-alone CRM applications or get one that's good enough from your current ERP or financial system provider. Less vendors means less headaches.

SAP has third party products that integrate its applications with CRM offerings from other companies. But why do that if C/4HANA lives up to its expectations? Why should a S/4HANA customer need to go anywhere else for their business software other than the company that provides its core financial and supply chain systems? And isn't that a potential upper-hand for SAP over Salesforce's CRM-only offerings?

McDermott, and the CEO's of other software companies like his, certainly care about this. And so should you.

ProsperWorks CRM is Now Copper...But That's Not What's Most Important.

It's been a busy time for the CRM software formerly known as ProsperWorks. The company who makes it announced that it has now officially changed its name to Copper along with and, at about the same time, launched a significantly revamped website.

Is the new branding better? That's debatable. The company insists that "copper" connotes "timeless quality, clarity and simplicity, and its relationship to energy and currency" and that its name, [according to Jon Lee, Copper CEO's and cofounder](#) "truly represents our vision and plans for the future of the CRM industry."

To Lee, people (like minerals such as copper) are "every company's most valuable resource and it's critical that CRM reflects that mindset and provides systems that put people's needs first." Copper's CRM application aims to be a valuable resource (like copper) that makes a company's most valuable resource (its people) more productive and efficient. Get it? Personally, I'm not entirely sure I like the new name. When I think of copper, I think of third-place medals (bronze is mostly made of copper), worthless pennies and pipes in my bathroom.

But let's not get caught up in names. What's really important is the direction the newly-named company is taking. No longer is it just ProsperWorks, a great CRM application. Now it's Copper, a great, Google-based, CRM application. Since its start as a Chrome add-on, the company has always been known for its integration with Google. In fact, whenever I've recommended ProsperWorks to prospective users it's always been to companies that are deeply ingrained with Google applications like G Suite and Gmail.

Now, I'm going to recommend Copper even more to my clients who use Google's apps. Why? Because the company is taking its relationship with Google a giant step further. It is moving its application to Google's cloud hosting platform and participating in Google's SaaS Sales Alignment Program that encourages Google developers to share and create integrated tools for each other's applications within G Suite. Copper already works natively within G Suite so that users don't have to switch applications. Going forward Copper is going to enhance its workflow tools and expand its already deep integration with Gmail, Hangouts, Data Studio and more.

I'm not sure I entirely get the name change. But I definitely get the strategy. This is how smart companies in the CRM space will succeed in the years to come: by aligning themselves with a major platform.

No longer can these companies cater to every customer. My clients today are steadily dividing into one of three different camps: Microsoft, Google and everyone else, like SAP, Oracle or a bunch of smaller, though still powerful platforms like Sage, Epicor, NetSuite and a host of vertical solutions that all offer their own integrations and developer communities. Sure, by choosing one platform over another you're sacrificing some customers. But, like Copper, if you choose to be excellent at one - such as Google - then you can create other and possibly better opportunities.

Copper's deeper alliance with Google will open the company up to Google Cloud's 12,000 customers in more than 110 countries, as well as a large number of Google partners who are developing machine learning and artificial intelligence tools. "The company's deep integration with Google Cloud will not only put us another step closer to making CRM a native feature of everyday productivity apps, but also scale that productivity-first approach to more and more customers around the world," Lee said [in a press release](#).

Copper has chosen its future direction and that path will be closely aligned with Google. Look for more CRM vendors to be making their choices in the months ahead.

Website Builder Wix Launches a CRM App

As a CRM consultant, I'm always recommending ways our clients can make better use of the systems we implement - and hopefully use us to help them. One of my go-to recommendations is website integration. Most good CRM systems can be integrated with a company's website to bring down user information so that their behavior can be tracked and communications can be tailored to their preferences. Unfortunately, not many small businesses do this, thinking it's too costly or time consuming.

They're wrong. It's not costly and it doesn't have to be time consuming. So here's another idea: instead of integrating a CRM system with a website why not create a website that already has these integrations built-in? That's the idea behind Wix's new suite of products called Ascend. The company – which is famously known for providing tools that help small businesses build websites and now serves more than 110 million users in 190 countries - launched the new suite of twenty products (some of which already existed) to help small businesses do their marketing directly from their Wix-developed website.

According to a [company press release](#), the new suite of products aims to help customers promote their sites, manage interactions across channels, automatically respond to online queries, better utilize an array of intuitive SEO tools, create unique content to engage customers through social media channels and leverage other marketing and CRM capabilities.

"It's not only about building a website, but actually helping to make it into a very effective business," Nitzan Achsaf, Wix's VP and General Manager of Customer Experience [told PC Mag](#). "It's goal is to help [companies] be more successful in managing the communication and managing the leads, and understanding how to convert visitors to leads, from leads to customers, from customers to returning customers, as well as how to get more traffic and how to be successful online."

Ascend will leverage the information gathered from users as they visit a Wix-developed site and allow a company to use that data to better nurture that prospect. For example, automatic messaging such as thank you and welcome notes can be configured as the well as the ability to automatically send out an invitation, quote or proposal which can then be discussed and negotiated via website chat.

"Instead of you needing to be an expert when it comes to sales and marketing, you have CRM, marketing tools, and financial tools, all in one place that talk to you in an intuitive way," Achsaf said. "So basically, Ascend suggests to you what to do. Instead of you needing to go through different channels, you can do it in one place."

The platform also contains an all-in-one dashboard for monitoring outreach, search engine optimization, email marketing and social media activities as well as the ability to create workflows, take notes and log in reminders.

"We have packaged these products within Ascend to be comprehensive, automated, and seamlessly engineered directly from the Wix platform," Wix.com chief executive Avishai Abrahami said in a [ZDNet interview](#).

Wix's reverse-engineering of CRM makes sense. Just consider the numbers. There are more small businesses with websites than CRM systems and if the process for marrying the two was easier than it's reasonable to assume that more small businesses could better leverage the capabilities of both. Knowing my client base of small businesses, however, I'm not so sure that the typical Wix customer will fully utilize all that's available. But to me, that's a great opportunity for not only CRM consultants but now web developers to help their clients fully take advantage of these tools.

Infusionsoft Rebrands as Keap Because That's What Small Businesses Want

Infusionsoft is now called [Keap](#), but the re-branding is not the only big change that happened. The Arizona-based company, known for its powerful CRM and marketing automation applications, is also changing its focus. Sure, its core products will continue to be developed and sold as Infusionsoft. But the company's leaders have decided to pivot from just offering a CRM application to offering a more comprehensive set of business tools specifically for small businesses that work in and around the CRM model.

“We’ll continue to lead the CRM and marketing automation industry with exciting updates coming this year with what we are now calling Infusionsoft by Keap,” the company's COO Keith Reed [said in a press release](#). “With the introduction of our new Keap product, we are able to serve an even larger market of small service providers who have been shut out of the benefits of automation because software providers have made it too hard and expensive.”

I'm still a little fuzzy on the name Keap, but I get the idea. Major CRM brands have been in a historic (and losing) battle to truly meet the demands of small businesses. The problem has been that either their products are too complex or they require too many add-ons to make them full-functioning.

This is why we're seeing more and more suites of offerings – like [Zoho](#) (my company sells Zoho products) [Apptivo](#), [OneUp](#) and [Sugar](#) - that are taking over a greater share of the small business CRM market. These products – some are CRM, some are accounting with CRM features - are being marketed as a one-stop-shop solution of applications that not only provide CRM functionality but financial, billing and service capabilities all under one roof. This is the holy grail for most of my small business clients who don't have the resources, or the patience, to deal with multiple, complicated applications that (supposedly) integrate with each other.

Keap is also taking things to a more granular level. Rather than trying to have its cake and eat it with all small businesses (and there are tens of millions of us) the company is focusing on small service providers like consulting firms, contractors, interior design, home repair and fitness companies. Basically, any small business that needs a single resource for client management, appointment setting, billing, payment, quoting and of course basic CRM functionalities like lead and pipeline management would be a targeted customer for Keap.

"Over the last two years, we've talked with thousands of small business owners to get a deeper understanding of their unique challenges in today's market," Keap CEO Clate Mask wrote in a letter to its website visitors and in its press release. "We discovered small service providers waste time juggling five to seven tools just to book appointments, send communications, provide

quotes or collect payments. That is 50 hours a month that could be spent servicing more clients, growing the business or at home with family."

Based on my experience, Keap is going to have its challenges. I'm sure the application is great, but let's face it: small businesses can be a tough audience – and the smaller the firm, the tougher. We tend to be irrationally demanding as if we're a large company. Because of the stresses that challenge us every day we are oftentimes impatient, inconsistent and difficult to nail down. Because our resources are limited, we sometimes to push the envelope for services and pricing. And because of our financial challenges we sometimes reverse course, delay decisions and struggle to live up to our promises. Well, at least that's me. But I think I can comfortably say that many of these factors apply to the hundreds of small business clients my company serves as well. So Keap will have its work cut out.

But then again, maybe not. Maybe, because Keap will be focused on delivering a more full-featured one-stop-shop business application to its small business customers that helps them perform many of their core business functions out of one place the company will succeed in this fickle market. Considering all that they're offering, I hope they do.

Is a CRM Necessary? CompanionLink Launches an Inexpensive On-Premise Contact Manager.

Since the late 1980's CompanionLink Software has sold a very popular suite of products that have enabled mobile users to synchronize their devices (we're talking BlackBerrys and Palm Pilots all the way to iPhones) with contact managers like Act, GoldMine, Maximizer and others. Now, in these days of cloud, cloud, cloud, CompanionLink is not only doing synching, but it's also getting into the contact management business...but not on the cloud. The company has launched a PC based solution called DejaOffice that costs a mere \$199.95 - one time only - for five users.

The premise is this: why spend all that money on cloud-based CRMs when an inexpensive, old-school, on premise contact manager will instead do the trick?

"Offices with five or ten sales people often cannot justify the monthly cost of shared cloud CRM solutions," Wayland Bruns, CTO at DejaOffice said in a [press release](#). "DejaOffice bypasses this issue with a one-time purchase and offers a return to the simplicity of PC based software." DejaOffice offers the features that a small team would want in a good contact manager. Contacts, calendars, tasks and notes can be shared and assigned to a user or unassigned and visible to everyone. According to the company, any user can see their own calendar, or can view all calendars. When a contact or event is private, only the logged in user will see it.

More importantly, the application includes CompanionLink's famous synching technology so that data can be moved to and stored on each individual user's mobile device (sorry, Blackberrys are no longer supported) and can then be access without an internet connection.

The result of all this is a faster system - both in-house and on the road - that's free of poor connections and spotty service. Bruns says that companies can be "totally in control" of its maintenance and security "and your data is not hostage to a SaaS provider."

Of course, there are a few challenges - ones that I've dealt with for many years selling on premise systems.

For example, upgrades to take advantage of new features and continued compatibility on hardware will require support. Integrations with other systems will be limited. Without the cloud, data may not be available real-time. Advanced features for campaign, service and project management (to name a few) won't be readily available. E-mail will likely need to be handled separately (DejaOffice has an Outlook add-on). For better or worse, security would be in the hands of your internal team. And synchronizing data - despite whatever a vendor may say - is never, ever perfect.

But then again...so what? If you're a small business or have a small team, isn't just a decent contact manager enough? Will you really use all those other features? Do you really need to integrate your system with others? Wouldn't just a simple, inexpensive system that enables your group to share accurate contact, history, notes and calendar information take be sufficient? For many, it just may. And for \$200 (and a few bucks extra for support), it could be worth the try.

Cere Network is a "Blockchain CRM" Company...What Exactly Does That Mean?

CRM company Cere Network announced that it has raised \$3.5 million in a funding round backed by a large crypto exchange and numerous venture capital firms that are investing in other companies nascent in cryptocurrency and blockchain technologies. The idea is to further finance the growth of support, offices and development of its blockchain-based CRM technologies.

“By building a complete solution on the blockchain, we are solving for CRM/CDP’s biggest issues in customization, efficiency, and secure and privacy-preserving data sharing,” Cere Network Co-Founder and CEO Fred Jin said in a [company press release](#). "The commercial white space the company is growing into holds tremendous potential and we're excited to be in the front row seat as the company forms one of the leading frontiers in the ongoing maturation of the decentralized technology."

The company's premise is important for future CRM systems. It's not really about email, opportunity management, customer service or workflows. Well, it is a little. But it's more about security.

People tend to over-complicate what blockchain technology does. But it's not that difficult to understand - even for luddites like me. It's merely a single, secure, file of sequential transactions that can only be updated or accessed with multiple permissions from allowed users. To me, as an accountant, it's an impenetrable audit trail. To larger institutions like banks it a bullet-proof way to secure financial transactions and this assurance is the reason why so many cryptocurrencies are using the technology to sustain their currency's value.

But back to CRM. Today's systems are built on older architecture which is integrated with other companies' databases which in turn creates a spider web of shared data that is at many times unsecured and exposed to privacy issues. Larger firms oftentimes have multiple CRM systems and pulling information from them is also a reporting and logistical nightmare.

What Cere Network is doing is building blockchain technology into the application's core foundation. This way any updates, changes, customizations and integrations will need to go through a much higher and vigorous level of approval before being committed. According to the company's website, their network "captures the entire customer journey on the blockchain, applications can securely collaborate and share customer data. And, with a simplified integration solution companies no longer need the highly specialized resources currently required with antiquated CRM solutions." All of this means, in the future, better security, privacy and transparency of user data.

For the CRM industry, this isn't as cutting edge as you think - Salesforce has already announced its own initiatives to build future generations of its application on a blockchain infrastructure and many other large players are planning to follow suit.

But as large as Salesforce is, it's certainly never going to control the entire \$48 billion CRM industry, which is said to be growing at a 16 percent annual rate. That leaves room for companies like Cere Network to develop their blockchain solutions which can be used for their own applications or - as I expect will happen - to be licensed out to other CRM companies who need to keep up with the times. It's early days for blockchain and CRM. But companies like Cere Network are giving much more clarity to the future.

A CRM Application That Brings All "Kustomer" Interactions Together is Now Worth \$500M

My company sells five CRM applications and we use one of them internally. In addition to the ones we sell, I've seen demonstrations of countless other well-known and similar systems, many of them excellent. All of these CRM systems have unique features. But they also have one very similar flaw. What is that, you ask?

It's this: there's no one place to see and respond to all of your customer interactions. Sure, there are "activity" tabs or views where people log in calls. There are email centers. There are special areas for social media engagements. Some can integrate with text messaging services. But you're going here and going there. You're clicking other screens or needing to open up additional windows. You're creating tickets and incidents and then having to move around different places within the system to get all the information needed to resolve the issue.

A startup aims to fix this problem. The company is called [Kustomer](#) and it has cumulatively raised \$173 million since 2015, including \$60 million from a group of well-known venture capital firms. Based on this last funding round, the company is now estimated to be worth about half a billion dollars. The money is needed. Over the past few years Kustomer has been growing rapidly due the unique way it's approaching CRM.

“We are the only company doing proper omnichannel, where you have a single threaded conversation that allows you to converse with customers in any channel you support,” CEO Brad Birnbaum [told TechCrunch](#). “To do that in a single threaded conversation sounds obvious, but I would challenge you to find others doing it the same way we do.”

Kustomer, which is based in New York, benefits from its newness to the scene. Most of the most popular, mainstream CRMs today have been around for at least ten years or so and have been trying to play catchup with recent communication methods such as Facebook messaging, SMS, social media, website chat in addition to traditional ways like email and phone calling. Kustomer built its CRM from the ground-up to take into account all these ways of communicating so that it could incorporate everything into one view.

Like any good CRM application, Kustomer - which starts at \$99 per month per user - may not be for everyone. It's more service, rather than sales, oriented and is challenging other service platforms such as Zendesk and Salesforce. The company's focus has been focused on B2C and retail, although management says it has customers in other industries that sell B2B and plans to increase investment in those areas. It also has resisted generating tickets like a traditional customer service system and instead relies on a single view stream of interactions from all

channels where agents can combine automation with their own insights to pick up service issues and resolve them.

I like Kustomer for a few reasons. It's already built a strong community of third-party integrations with well-known brands such as Amazon, Shopify, Magento, Slack and many others. It's currently being used by larger brands such as Rent the Runway, Sweetgreen and UNTUCKit. The company has managed to raise significant funding and management is investing heavily in R&D to expand the product.

But what I like most is its simple approach to CRM: all interactions in one place, regardless of the channel. I'm hoping that the CRM vendors that I represent are looking closely at Kustomer's model and are planning similar changes to their applications in the near future. I know my customers will want this.

Can a Project Management System Like Asana or Basecamp Replace a CRM?

If your company hasn't tried a project management system, you really should consider one. Today's project management applications, like [Asana](#), [Basecamp](#), [Trello](#), [Wrike](#) and [Podio](#), are powerful, flexible, cloud-based platforms that are, for the most part, easy to setup and easy to learn. And in an environment where many employees and contractors are working remotely, it's becoming an increasingly popular way to share information and keep a distributed workforce up to date.

When you use a project management system, your teams are able to schedule and share tasks, emails, notes and progress on just about anything your company is doing, both externally and internally. And when you think about it, isn't everything in the end just a project? A customer job. A marketing campaign. The hiring of a new employee. The development of a new product. A bulk email outreach. The setup of a new piece of equipment. A significant bid. A forecasted sale. A product return. A customer service issue.

A good project management system will allow your team to do all these things. You can create and customize forms for data entry, integrate with other popular applications and help track, through metrics, dashboards and analytics, the progress of projects and the productivity of your people. Today's project management systems track sales, cases, issues and tickets, help build product roadmaps, share calendars, send out emails, enable collaboration and also come with workflows and other artificial-intelligence tools to ensure that things are done automatically and with minimum human interaction.

So, if they can do all these things, then can't a project management like Asana or Basecamp in the end just replace a CRM system like [Salesforce](#), [Microsoft Dynamics](#) or [Zoho](#)? If you visit the above-mentioned project management providers they'll infer as much. Some outwardly tout features that go head-to-head with CRM applications. Others are more subtle and prefer to position themselves as "partners" or add-ons to CRMs. But the answer is obvious: yes, a good project manager can replace a CRM system.

But then again, the reverse is also true: a good CRM system can also replace a project management application.

That's because many CRM systems now offer integrated project management modules. And most of the good ones can be customized to accommodate new data entities that can act as project managers. And even if you don't want to go to the effort of doing all of that, just taking advantage of the out-of-the-box calendaring, task management and productivity features in a

CRM system would suffice for most of a company's project management needs, particularly if the company is smaller and its needs aren't complex.

If you're trying to choose between a project management or a CRM system know that either can do the job without having to get both. To help decide, you should be honest about your company culture. Are you a project-oriented company, one that's managed by people that come from an engineering, service or operational background? Or are you more of a sales-driven company that's driven by deals, forecasts and commissions.

Determining that will help determine which type of application is best. Once you make that decision, don't look back. Do what you need to do to fit that application to your needs. Hire a consultant. Create a long-term plan. Map out your objectives, devote resources and closely monitor your progress. Know that the same implementation rules apply for a project management system as they do for a CRM system: you need to have management involvement, a strong administrative team, and a system of reporting and monitoring the data to enforce accuracy and completeness.

So yes, go ahead and get project management system instead of a CRM. Or get a CRM instead of a project management system. For the most part, either should be satisfactory, as long as it's implemented the right way.

Pega Now Works on Google's Cloud Platform and Isn't This the Future for CRM?

CRM provider Pegasystems, Inc. announced that its Pega solutions will now be able to be deployed on the Google Cloud platform. The company's products are already certified to work on a number of other public cloud platforms including Microsoft Azure, Amazon Web Services and Pivotal's Cloud Foundry.

For more than three decades, the Cambridge, Massachusetts based company, which boasts more than 4,000 employees, has provided both CRM and digital process automation applications mostly to larger enterprises. The company's model has been to offer its tools for developers to use on various cloud-based platforms. Google, Microsoft, Amazon and others are competing with each other for market share in cloud services with each offering different levels of functionality and security. By enabling its applications to run basically anywhere, the company believes that it is providing its customers with more options and allowing their organizations to adapt their cloud strategies as their business needs change.

"Our partnership with Google Cloud allows us to provide clients with the option to leverage the power of Pega on Google Cloud's secure and dynamic cloud platform," Frank Guerrero, Pegasystems' chief technical systems officer, [said in a press release](#). "This expands our ability to empower clients to choose the right cloud solution that meets the challenges of today and tomorrow."

Pegasystems' strategy mirrors how application vendors are responding to the evolution of both operating systems and the cloud over the past few decades. More than twenty years ago, business users had few choices where to run their applications other than on a Microsoft Windows platform. The lack of choice was frustrating for many companies. Over time, other (and some believe better) platforms – like, Linux, Chrome and iOS - have taken significant market share away from Windows.

Today's rapid rise of competing public cloud deployments provides similar challenges. Pegasystems is rightly choosing to not choose sides. Not wanting to repeat these past mistakes, software vendors like them are ensuring that their applications are designed to run on any of these platforms.

Salesforce, for example, has strategic partnerships with public cloud infrastructure providers like Google and Amazon. SAP's CRM offerings also work on these platforms. Unfortunately, Microsoft (being Microsoft) appears to be resisting this trend and prefers to point its partners and customers to develop solutions on its Azure platform. But the company is still evolving. In the

meantime, both Amazon and Google provide tools for their users to run Microsoft applications and operating systems on their servers.

Of course, operating on multiple public cloud environments requires more support and therefore more resources. Pegasystems provides a guarantee that its customers will never be locked out from their applications, regardless of the platform they choose and not only offers round-the-clock support and documentation but a commitment for "continuous certification" of their solutions across multiple cloud environments, as well as a promise to continue evaluating future cloud environments for certification.

Pegasystems, like other CRM providers, understands that that customers don't want to be limited by the public cloud infrastructure they choose. CRM providers who limit these choices will be limiting their own future growth.

AI and CRM

Forget ChatGPT, This Is How AutoGPT Will Soon Disrupt Your CRM System

While the mainstream public has been obsessed with ChatGPT, the conversational AI chatbot that's been popular for making recipes, generating blogs and writing jokes, there's another AI robot that's creating even more excitement in the AI world. It's called AutoGPT and it will have an enormous impact on your business in the next few years.

AutoGPT is based on the underlying technology behind ChatGPT. But its biggest difference is this: ChatGPT relies on humans to provide it guidance. AutoGPT doesn't. What does this mean? Let's take an example using your Customer Relationship Management system.

Let's say you want to create a new marketing campaign that chooses everyone in your database with blue eyes, green hair, who is also a Philadelphia Eagles fan and a buyer of one of your product lines so you can inform them of an accessory for their product. At this moment, most CRM systems don't yet include the AI technology to do this on their own, so humans have to take a lot of steps to build the list, create the template, send the email, respond, etc. etc. But very soon our CRM systems will catch up. So let's assume that's the case.

ChatGPT can take these directions and put together a campaign. But ChatGPT will need some love – or a better word: prompts - from the human. There will be questions about what customers to include and whether or not the messaging makes sense. ChatGPT will ask for help designing the template, scheduling the email and determining a subject line. ChatGPT will need to understand from a human how to tackle responses to the campaign. ChatGPT will also need to be prompted by a human to further analyze the data or perform more follow-up steps to the initial campaign.

ChatGPT is a conversational chatbot. It will need some back and forth to do its job.

AutoGPT does not need these prompts. If trained correctly it will make these decisions on its own. It will learn - by itself - how to reply to customer responses based on other responses. AutoGPT will, based on prior campaigns, make its own determinations for the email design, scheduling, graphics and subject line. It will choose on its own the targets of a campaign and then determine whether or not opens, views, clicks and responses are worth reporting back to management. It will independently create new lists of target prospects and customers based on who has or hasn't responded to prior campaigns and then automatically reach out to those targets again based on past communications. It will literally perform the role of a marketing professional with minimal supervision. More actions. Less conversations.

And that's just one use of AutoGPT in a CRM system. There will be many others, from behaving like an independent customer service representative answering questions on its own based on prior responses and other data, to following up on open orders and quotations in lieu of a salesperson. And, as technology expert Greg Isenberg [predicts](#), it could help create a social

media presence that "will understand every nuance of your community and create content & memes that have the highest probability of landing" and that will "change course based on data."

AutoGPT does not need human prompts like ChatGPT. It is autonomous and independent. It's also experimental, open source (you can get it on GitHub), requires programming (for now) and currently faces many challenges from accuracy to bias.

"AutoGPT has internet access, long-term and short-term memory management, text generation, and integration with 11 Labs (AI text to speech gen)," Isenberg [writes](#). "And it operates AUTOMATICALLY without YOU."

Yes, it's scary - even terrifying - to some. But it's coming. And it's going to elevate the importance of your CRM system. Because for all of this to work, AI needs data and that data is in your CRM database.

The Achilles Heel of AI That No One Is Talking About

You can't visit a tech website nowadays without the words "AI" all over the place and I'm as guilty of this as anyone else (see my headline above).

AI is the tech buzzword of 2024, even though it's not really a word. A year or two ago it was the metaverse. Before that it was a myriad of tech terms and acronyms ranging from IoT and AR/VR to robotics, 3D Printing, autonomous vehicles, machine learning and Web3 as the tech industry desperately seeks the next iPhone or big thing from which to re-invent itself. Maybe AI is the next second coming or maybe it's over-hyped or will be replaced by the "next big thing" in a year two.

Regardless of the hype, AI does have a lot of potential and it's spawning countless startups and billions from investors, VC firms and software providers to realize that potential. We're just at the beginning of this. Over the next few years, every company that has anything to do with technology will be rolling out their next generation of products that is "leveraging AI." It's good marketing.

Except for one problem: AI has a big Achilles heel and unfortunately no one seems to be talking about it. The problem isn't with the technology. It's with what the technology relies on: data.

For AI to do its job it needs to use data. For [AutoGPT](#), the likely next generation of ChatGPT that promises to automatically perform tasks without conversation, it will have to leverage the information available in a database – or multiple databases - to perform those tasks. For Google's Bard to create email campaigns or productivity tasks based on Gmail or Google Docs it will be reliant on the information in those sources. Salesforce's Einstein needs good customer relationship management data to track sentiment and opportunities.

I write a lot about CRM because my company implements CRM systems. Many people in my industry are excited by all the new AI-based automations coming from the software vendors in this industry. Salesforce is already way ahead of the curve with [recent announcements](#) touting their AI offerings. Other big technology companies like [Microsoft, Meta and Amazon](#) and many CRM software providers that cater to smaller companies like [Hubspot, Zoho and Pipedrive](#) are announcing rollouts of their new features that are using AI. And I'm just naming a few. AI is creating mass giddiness across all software sectors - from CRM to accounting to HR - not only because of it's promise but because it's a shiny new buzzword that can be used to excite customers and – most importantly - keep them paying their monthly fees.

But, like cars that need roads, all of this software needs data to do its job. And unfortunately the data at most businesses - big and small - kind of...well...sucks. Don't believe me? Just talk to a few of my clients and they'll openly admit this.

Even at my largest clients, data is everywhere - spreadsheets, emails, document management storage sites, CRM systems, accounting systems, HR systems, inventory systems, order systems,

even manual files. Matching orders received with invoices often spits out errors. Building email campaigns is a crapshoot. Automating things like sending out overdue notices or confirming orders received oftentimes confirms with the wrong recipients. Even doing a simple thing like creating a list of customers to send a Christmas or birthday card takes a mass investigative effort.

Did we really just wish that guy a happy birthday? Didn't he die last year? Did we just send our big client a Christmas card? But they're a Jewish deli! You get the point.

Every company I visit I find that their data is anywhere between "not great" to a "total mess." Fields are incomplete and haven't been updated in months. People who changed jobs month before are still listed as working at the former company. Inventory balances lag behind physical counts. Billings are done days after products are shipped. Monthly cash reconciliations reveal dozens of missed deposits or disbursements. Are we really going to rely on AI tools to "automate" functions when the data is this unreliable?

That's the problem. Building the iPhone took time. But it couldn't succeed until networks and an app infrastructure was built around it. Creating all these wonderful AI tools is pointless unless the data they're leveraging is leveragable and yes I just made that word up.

Some of this problem can be addressed by future iterations of AI tools that don't take just one source of data at face value and instead are built to validate the information by checking multiple places. So a person's birthdate in a CRM system can be validated by mining an external government system, assuming access is granted. Or before sending out an overdue invoice notice that could upset a good customer who normally pays on time, a payment history at the bank as well as the accounting system can be checked. Are software developers taking these internal controls into consideration as they're rushing out their latest AI treats to their customers? Are they building in the ability to check multiple data sources before taking action? I'm doubting that.

But ultimately they will. However, it's going to take some time. Which is why I'm betting that many of the software pundits who are glamorizing AI are going to scratch their heads and wonder why more companies – particularly smaller companies – are resisting the magic. My clients are no dummies. They're not going to trust automation just for the sake of it, particularly if it causes more problems than it solves.

There will be solutions to this. And my smartest clients who want to take advantage of these tools so that they can cut overhead and get things done more productively will recognize the importance of a clean and complete dataset and invest the needed resources into making it clean and complete. Hopefully they'll be doing some of the things I suggested in a [previous piece](#) I wrote. I'm optimistic about this. But I'm also cautious that in the meantime the Achilles Heel of AI isn't getting the attention it deserves.

9 CRM Applications That Are Already Using ChatGPT

Right now, as I write this, countless software companies are building new features into their products that will leverage [ChatGPT](#), the conversational AI bot that's recently been made available for license. And we're just at the very beginning. In the Customer Relationship Management (CRM) space, here are what a few of the big (and not-so-big) names are doing.

[Big Purple Dot](#)

The provider of CRM and recruiting solutions for the mortgage and real estate industries has been [integrating ChatGPT](#) with its CRM offerings to help its customers easily and efficiently interact with their clients and streamline their sales processes, resulting in – they say - a significant improvement in customer satisfaction, lead generation, and operational efficiency. Features include natural language chat interactions, auto-responses to handle questions and objections as well as coaching assistance for team members.

[HubSpot](#)

The popular marketing and CRM platform is using ChatGPT to power its ChatSpot.ai and Content Assistant tools. CMS Wire's Jennifer Torres [writes](#) Content Assistant is "aimed at facilitating marketing and sales teams with the ability to quickly produce and distribute various content types, including blog posts, content for landing pages, website pages, sales and marketing emails, as well as knowledge-based articles." As for ChatSpot.ai, the company says that it's different than a ChatGPT clone because it can draw response data from the HubSpot CRM and inter-organizational data sources. It then incorporates a variety of data from other programs and tech including image generator DALL•E 2, Stable Diffusion (a deep learning, text-to-image model), Google Workspace and keyword research in order to provide results more specific to a company's needs.

[Microsoft Dynamics](#)

Lucas Mearian at [Computerworld reports](#) that Microsoft's new generative AI chatbot - which is based on ChatGPT technology - will draft email responses to customers, create textual summaries of Teams meetings, and generate marketing and sales email campaigns. "Based on OpenAI's GPT-3, Microsoft's new Dynamics 365 Copilot is an extension to its existing CRM and ERP software, working alongside those applications to assist in answering questions, creating content, and summarizing conversations and notes," he writes. "The Copilot bot, which runs on Microsoft Azure's OpenAI Service, can be used with Microsoft Dynamics 365 Sales and Viva Sales applications to help write email responses to customers and create an email summary of a Teams meeting in Outlook." That meeting summary will pull in information - like product and pricing - from the CRM system and provide insights from the recorded Teams call.

[planetRE](#)

The real estate sales and marketing platform recently introduced two new AI platforms using ChatGPT called [Chocolatechips.ai](#) and [Aelo.ai](#). Chocolatechips.ai embeds new technology in AI imaging, video, text and avatars and can be used by a single user or by teams with permission-based sharing, and collaboration of content which can then be turned into emails, blogs and social media marketing. Aelo.Ai, a fully automated AI driven virtual staging platform empowering agents, builders to allow buyers and prelisted sellers reimagine a variety of home interior or exterior space transformations which they say happens “all in a matter of seconds using uploaded or live photos.”

Redtail

The CRM system for financial advisors now has a [bridge with ChatGPT](#) - thanks to its partner Orion Advisor Solutions - that can analyze conversations between advisors and their clients and suggest solutions - all with the ability to edit before sending.

Reply.io

The business communications platform has rolled out its own AI tool called Jason AI which uses ChatGPT's technology to generate, personalize and optimize emails. According [to a report](#) from Chris Wood of Martech, Jason AI "uses Natural Language Processing algorithms and the ChatGPT language model to identify specific keywords and phrases to recognize the intention of email replies received by the marketer. The tool can then generate suggested responses. Users can select the option to review responses before they're sent out. If marketers and sales associates are comfortable with the AI's performance, they can opt for the tool to automatically send out messages without review."

Salesforce

Salesforce has upgraded its Einstein AI tool to leverage ChatGPT for a wide-ranging number of functional uses throughout its platform. As Eray Eliaçık [writes on Dataconomy.com](#) the ChatGPT-powered Einstein will help generate sales activities, including emailing, meeting scheduling, and other ready work automatically. It will also use data-driven personalization to develop unique content for email, mobile, online, and advertising that will attract and retain customers. Because Salesforce owns the collaboration platform Slack, users there will be able to use the Slack-GPT app for artificial intelligence-powered discussion summaries, and to perform deeper research to learn about any topic, as benefit from a writing aid to compose messages swiftly.

Widewail

A popular customer review and management platform, Widewail has now [integrated ChatGPT](#) and other AI features into its platform to support clients that prefer to manage review responses in-house and also to bring new topic and sentiment analysis reporting to all clients. According to a company statement "AI prompts are crafted from years of people-powered responses to provide the most accurate and strategic response possible. Leveraging the data from client systems of record, such as a Point-of-Sale System or CRM, Widewail can generate responses tailored

specifically for each of your customers. Business owners can optionally provide custom instructions to Widewail to help ensure responses match specific tone or branding preferences."

Zoho

Zoho - a very popular CRM platform for small and mid-sized businesses is using [ChatGPT to power](#) Zia, it's AI-based sales assistant across many of its business applications including CRM, Analytics, Desk, and SalesIQ. Features include extracting important information from customer records, predicting deal outcomes, creating custom emails and templates, and checking for grammatical errors. It will also automatically summarize tickets, analyze customer tone, generate replies from a knowledge base (and track down solutions), create multiple versions of emails, highlight action items, and generate email summaries and transcribe conversations, among other tasks.

When my CRM clients ask me if they should be investing in AI I tell them yes...but not where they think. The software companies mentioned above - and many others - are already leveraging ChatGPT and other AI tools now and will continue to do so in future iterations of their software. Users – my clients - need to invest in training so that they can use these features to better run their businesses.



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