CRM Product Comparison

2024

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It's 2024, Why Are We Comparing CRMs?

It's a reasonable question to ask. Customer relationship management (CRM) systems are now entering their fourth decade of widespread use. They began as contact managers, evolved into sales force automation systems and are now a core part of many companies' operations. The CRM market is worth $40 billion today and the grand majority of businesses have one.

Not, of course that they're using them so well. But that's another topic for another time.

For now, it's about the software. But here's my advice: don't just make it about the software. If you notice, we've rid ourselves of the obligatory matrix aligning features with different CRMs. Why? Because most good mainstream CRM applications today have very similar features and function. And please know - if one provider comes up with something spectacular (and given the maturity of these applications that's becoming less likely) trust me when I tell you that their competitors will have them copied in weeks, if not days. With most CRM's offering similar features, you should focus on whether you're comfortable using it, making sure your system will address specific goals, and the CRM vendor. You're not buying the product; you're entering a long-term relationship.

Which is why we wanted to show you the pros and cons of the applications we sell, and even some great ones that we love but don't sell (The Marks Group only has so much bandwidth). This way I'm hoping you can cut to the chase and choose what's really best for your company.

So read and let's discuss. I'm always available, personally, to provide more input, make recommendations and guide you through your CRM technology decisions.

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These are the features every good CRM application should have:

- ✓ Free Trial
- ✓ API Integration
- ✓ Integration with Gmail
- ✓ Integration with Outlook
- ✓ Custom Fields
- ✓ Custom Modules
- ✓ Custom Dashboards
- ✓ Workflows/Automation
- ✓ Marketing Campaigns
- ✓ Email Templates
- ✓ Custom Reporting
- ✓ Schedule Reporting
- ✓ Social Media Collaboration
- ✓ 3rd Party Vendor Marketplace

Price Annually: $165/user/month

Price Annually: $40/user/month

Salesforce meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

Fully-customizable, Zoho CRM provides unified solutions for businesses of all types and sizes. Users can use the Dashboard view to conduct sales and marketing analytics and gain insights, automate daily routines to improve workflows, and customize the Canvas feature based on their industry needs. Expect your communication internally and externally to be extremely efficient.

Pros: It's scalable, cloud-based, and powerful and customizable enough to meet almost any business need. It's a "complete CRM".

Pros: Affordable option that can be customized to fit almost every industry that integrates all the elements of customer and prospect interaction. Zoho One for scalability

Cons: It's very expensive with a lot of additional costs to get the most out of the software.

Cons: Overseas support.

Price Annually: $105/user/month

Price Annually: $85/user/month

Microsoft Dynamics CRM's automated features and AI help sales teams better understand their customers, know the best time to send an email, and monitor social channels better than ever before. Dynamics 365 Sales is focused on Salesforce automation and helping teams find and close opportunities, and it comes as a single tool or can be bundled with other business operations tools.

SugarCRM allows your sales, marketing, and service teams to collaborate on your business's customer experience. The CRM helps you capture leads, manage your contacts, and automate the sale of renewals for subscription businesses. SugarCRM is a powerful CRM software that offers plenty of features and third-party integrations. This platform helps streamline communication so your team stays coordinated and organized.

Pros: Seamless integrations with Microsoft 365, Power BI, and other Dynamics 365 CRM apps

Pros: Great customer service tools and easily implemented marketing campaigns

Cons: The UI may be difficult to navigate for those unfamiliar with Microsoft products.

Cons: Stiff learning curve and complicated integration process.

:copper

Price Annually: $59/user/month

Copper CRM is known for Google Workspace compatibility, automation, simplicity, lead management, customized reporting, quick onboarding, security, and ability to work with different industries. The three plans offered have competitive pricing and features.

Pros: It's designed with simplicity at its core. Rather than overcomplicating workflows, systems, and automations, everything is incredibly easy.

Cons: It's ill-equipped software for companies that don't use Google.

insightly

Price Annually: $49/user/month

Insightly CRM is a good customer relationship management solution, especially for startups and small businesses. It's a very user-friendly CRM software that has a great look and feel. Insightly offers the right amount of CRM tools along with features for marketing automation, project management and customer support.

Pros: When it comes to analytics and reporting, Insightly has an advantage. It's very effective at letting you control your reports to see what metrics and data you find most important.

Cons: There have been complaints revolving around certain features requiring too many steps, which slows down productivity.

zendesk

Price Annually: $115/user/month

Zendesk is a cloud-based help desk platform that is simple to set up and operate. It helps boost customer happiness, productivity, and cost savings. As a result, it's a versatile and convenient help desk tool, even for freelancing support agents who operate from home.

Pros: It can manage all client contacts, including self-service, through a single interface ensuring a consistent experience.

Cons: There have been complaints about collaboration with coworkers. They offer basic collaboration tools, but it's not overly easy to conduct a smooth discourse.

method:CRM

Price Annually: $44/user/month

Method is a CRM solution that is designed to work in a two-way sync with your Quickbooks account. It can do all the major tasks that an everyday CRM can do, like help you get new leads, make it easy to track and nurture those leads, and close more deals.

Pros: The major benefit is its integration with Quickbooks, but it also has impeccable tracking tools and other features for creating estimates, managing work orders, and job scheduling.

Cons: It does not track interaction with leads and customers automatically. You will need to manually log the details of these interactions or use integration with Zapier to send data from a third-party app to the CRM.

nimble

Price annually: $24/user/month

Nimble is a communication-focused CRM that makes it easy to keep in touch with your leads and clients. The platform includes some powerful tools to generate new leads, as well as provides a user-friendly way to manage messages, segment clients, and stay on top of social media. For everything that Nimble has to offer, this CRM software is surprisingly cheap, too.

Pros: Very user-friendly interface for a very affordable price

Cons: Third party apps might be needed for additional integrations.

pipedrive

Price Annually: $49/user/month

Pipedrive is a deal-driven customer relationship management CRM solution that also works as an account-management tool with the ability to assist with marketing and the entire sales process. Pipedrive's proactive nature automatically tracks and organizes calls and emails and synchronizes schedules across devices. It's also easy to use and customize, making it a good choice for many small businesses.

Pros: Affordable paid plans that offer unlimited customizable sales and pipelines.

Cons: There may be a steeper learning curve for getting the hang of Pipedrive. It is something to consider when trying the 14-day free trial.

HubSpot

Price Annually: $150/user/month

HubSpot gives companies the means to process and analyze customer information, extract relations from disparate data items to reveal insights and depict opportunities, generate sales funnels and implement loyalty campaigns. HubSpot CRM users prize the software for the way it allows them to categorize customers according to their expectations and commit time to prospective buyers.

Pros: Easy to use and you can even use it as a CMS for content marketing or to build your website.

Cons: Difficult to use NOT as an all-in-one tool. It also gets expensive quickly as your business grows. Marketing centric over CRM.
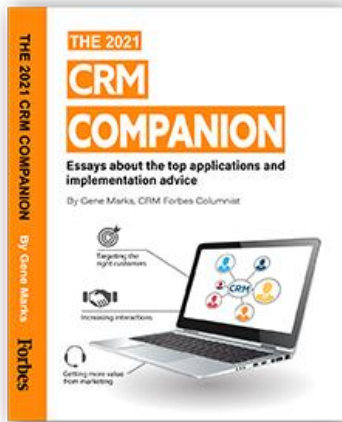
What are the benefits of CRM? What aren't you getting more out of your existing CRM? What are the latest CRM trends that you should know about?

Get access to the tips and techniques successful sales and marketing leaders use to drive customer loyalty, growth and ROI.

The 2024 CRM Companion guide is packed with tips that show you:

- Powerful techniques used to build customer relationships that can increase the value of your business
- Proven strategies that make rescuing failed CRM implementation easier
- The top questions to ask before deciding to replace your CRM.

…and much more!

To download this FREE book, **CLICK HERE.**

About the Marks Group

For over 25 years, The Marks Group has helped thousands of small businesses select, customize, and implement customer relationship management (CRM) systems that have streamlined their sales process to grow revenues, profits, and efficient communication.

The leading CRM platforms will strengthen client relationships through a variety of tools designed to fit your company size and needs. The top CRM's offer flexible solutions that automate key client interactions and transactions and efficiently manages your marketing campaigns. The following provides an overview of the best CRM products available in the market today.

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