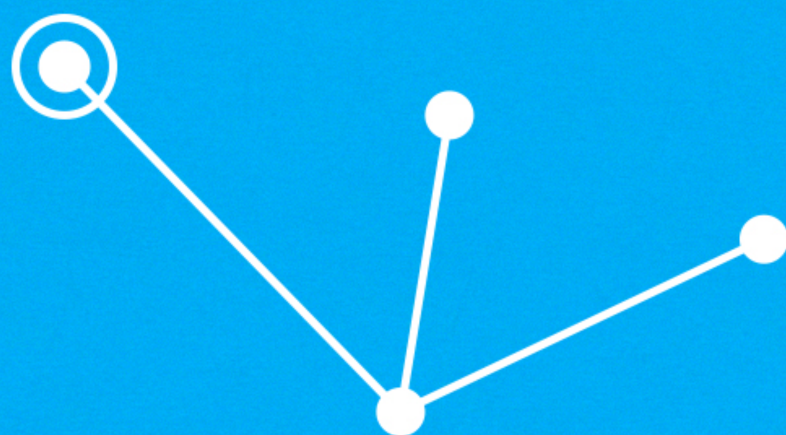
The Ultimate Guide To



CRM Apps

By Matthew Guay

zapier

A free guide from your friends at Zapier

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About This Guide

Managing your contacts didn’t used to be so difficult. When you started your business, you had a handful of suppliers and customers, and few enough team members that you could memorize their email addresses.

Things change. That’s good: business is growing and you have more people than ever to keep track of. You need a CRM—a Customer Relationship Management app—to help you keep track of everyone.

First, though, you need to learn a bit about CRMs. That's where this guide comes in.

This guide will teach you what CRMs are for, and will walk you through the best features of dozens of the most popular CRM apps. It'll then help you find ways to put a CRM to use in your business with tips from other teams and Zapier automations to simplify your work.

Who Is This Guide For?

Everyone. No, really. If you've ever used an address book to store names and addresses, you need to learn how a CRM can help you get more out of your contacts. If you've used a CRM but need a better one, you need to look through our roundup of the best CRMs and perhaps find one that can automate your marketing. And if you already have a CRM, you need to find more ways to automate your CRM and integrate it into your work.

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Chapter 1: Intro to CRM

The Beginner's Guide to CRM: What Is It? Why Use One? What's One Cost? And More Questions Answered

Everyone knows what browsers, word processors, spreadsheets, email and chat apps are used for in a workplace. Maybe they were confusing when you first started using a computer years ago, but now they're an integral part of your work. If you switched the app you were using, perhaps opening Safari instead of Chrome to browse the web or Google Docs instead of Word to edit documents, you might feel a bit lost at first but in general you'd know your way around. After all, you already understand web browsers and word processors.

But then, there's a whole category of business apps that can be incredibly confusing when you first dive into them. You'll hear of them in passing, see them mentioned in business articles, and puzzle over their abbreviations: CRM, ERM, CMS, SCM, and more. These three-letter apps are as opaque as three-letter agencies.

So, before diving into the apps and tricks that'll help you manage your contacts and more, let's take take a moment to break down one of the most common, most expensive and often most time-consuming of all three-letter apps. We're talking, of course, about the CRM.

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Why a CRM? It's All About People

You already understand the utility of email and address books. The former is a digital version of a letter, and the latter is a flatter and brighter Rolodex. CRMs are one step up from them both.

CRM stands for **C**ustomer **R**elationship **M**anagement, so by definition, a CRM is an app that helps you manage your relationships with current and prospective customers. Your email and address book already do that, in some ways—your email links related messages together, and lets you find all messages from a contact with a quick search, while your address book can hold as much info about your contacts as you want. Even the old-fashioned Rolodex was a CRM of sorts.

But a true CRM should do a lot more than that, thanks to the **R** in its name: relationship. Most CRMs are designed to help you string together the relationships in your contacts: the messages from the same person, the team of people you've talked to at the same company, the person on your own team who knows someone on your client's team. They'll help you see the big picture, and then know exactly what to talk about the next time you email someone—or what your colleagues have already asked them.

Marketer Jennifer Burnham summed up the importance of the **R** in CRM when she wrote on the Salesforce blog that “while a CRM system may not elicit as much enthusiasm these days as social networking platforms like Facebook or Twitter, any CRM system is similarly built around people and relationships.” It's true. And it wouldn’t do much good to like or follow all of your customers' pages on Facebook and Twitter, respectively, as those networks are designed for personal relationships, but a CRM can be your own internal network that helps you understand your customers and clients, and your own team.

> “While a CRM system may not elicit as much enthusiasm these days as social networking platforms like Facebook or Twitter, any CRM system is similarly built around people and relationships."
>
> - Jennifer Burnham, Marketer

As such, you could use almost anything to make a CRM of your own. You could have a cork board where you pin business cards and letters from your clients, with string connecting the relationships. Or you could use custom tags in Gmail and the info in your address book to approximate a CRM's functionality. And then, when you want more, you can dive into the world of [CRM software](#).

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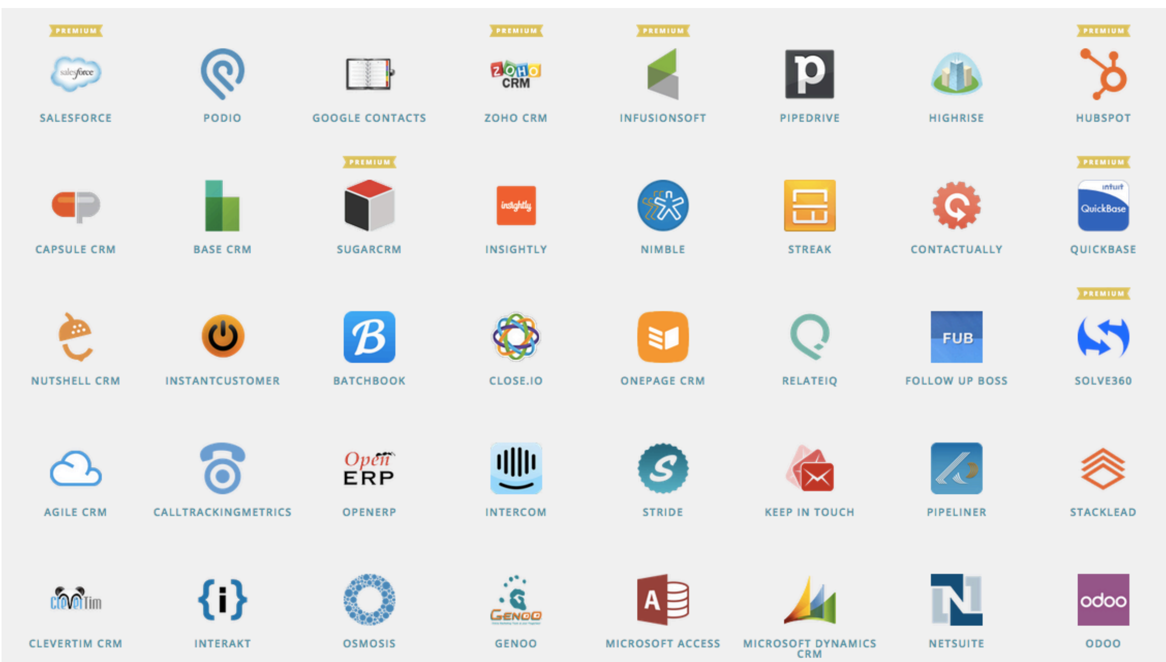
Which CRM is Best? First Narrow It Down to a Category

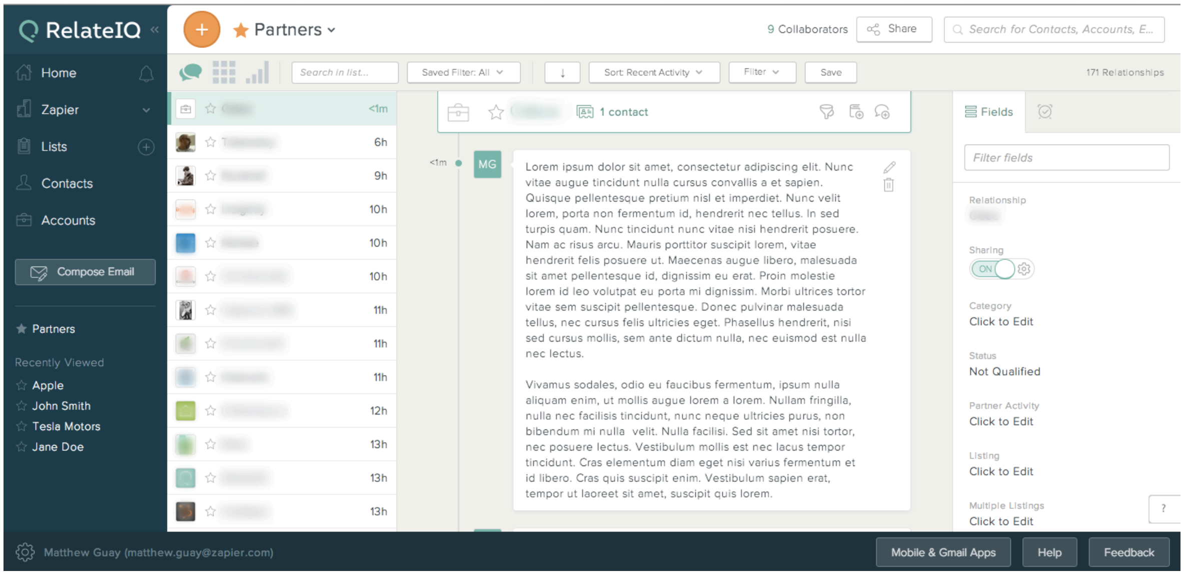


One of the biggest reasons CRM apps seem scary is that they're so varied. All web browsers, on the other hand, have an address bar at the top and the main part of the screen is dedicated to your webpage. Similarly, almost all email apps have a list of messages on the left or top followed by a preview of the currently selected message.

CRMs, conversely, come in all shapes and sizes. They’re all designed with the same goal in mind: to help you understand your contacts better and act on that understanding. But the ways of approaching that challenge are as varied as office chair designs. Just as we all don't sit the same, we don't work the same. And today it seems there’s a CRM for every way you could possibly work.

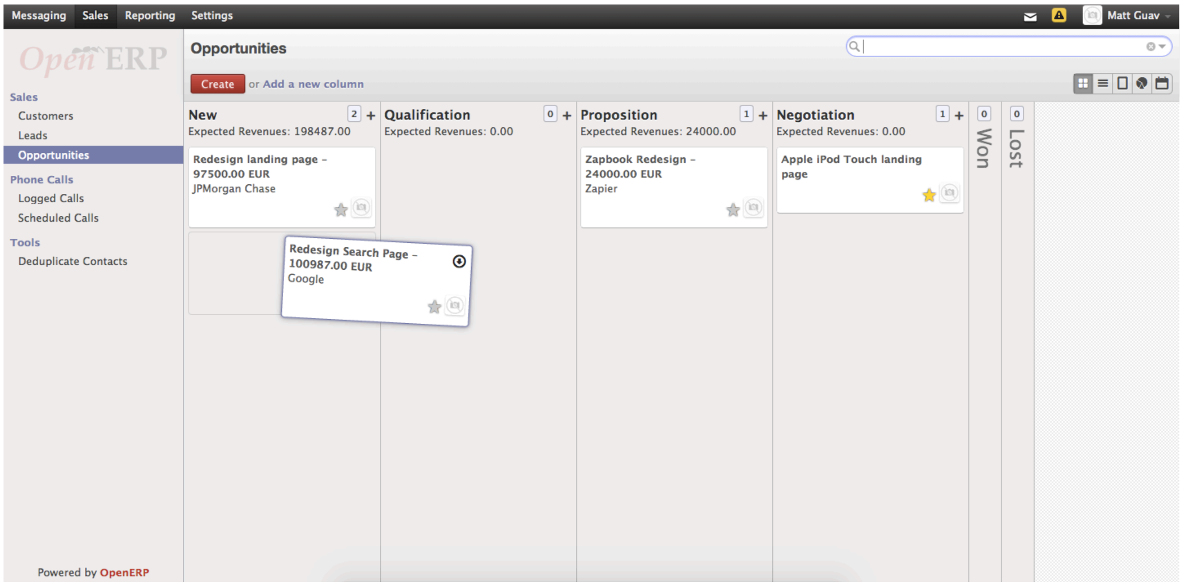
Though they all tend to fall in broad categories—some in more than one of them—here are three of the many types of CRMs you’ll find.

1. Conversations



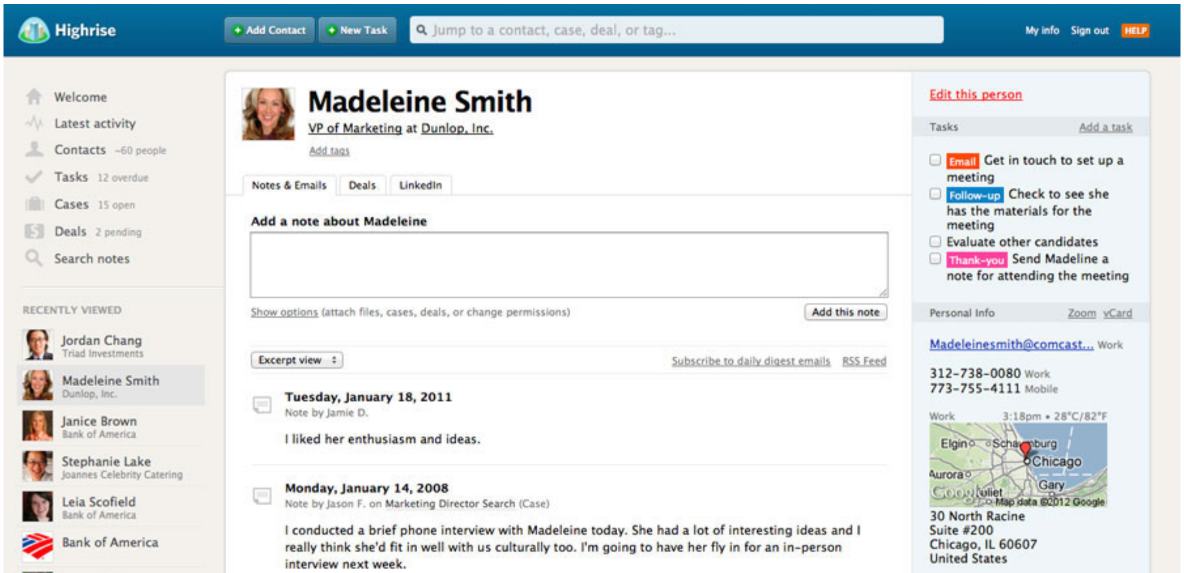
Email overload is a normal problem today, but you don't have to see it as a problem. A CRM that's centered on conversations can pull out the interactions, group them by the team or company represented in the conversation, and help you see exactly where to reply and follow up. It's a smarter email app that turns your messy inbox into an organized place where you'll actually stay in touch with the customers and contacts that matter most.

2. Leads and Deals



At the end of the day, business is business, and moving the needle with sales is what makes paying for a CRM worthwhile. That's why so many CRMs put leads and deals front and center. You'll track potential customers and clients as "leads", add info as you work on convincing that customer to use your product or service, and then turn that lead into a "deal". The CRM helps you log the steps, tracing the interactions that led from the first contact to the finalized deal, and is crucial for working together in a sales team that otherwise would struggle to know exactly where the deal stood at any given time.

3. Contacts



Sometimes it's the human touch that counts most. When you know something important about your customer—their birthday, their current position, or that dish they ordered the last time you met for lunch—you'll be much more likely to make a lasting connection. That's where the contact-centric CRMs come in. They're designed to help you gather as much info as you can about the people you're talking to. You'll log interactions and write notes, and then when you're set to talk again, you'll pull your CRM up first so you'll have their info fresh in your mind.

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What's a Lead? Common CRM Terms Explained

You finally understand CRM, but once you try out a CRM app you'll find it's filled with new terminology: leads, deals, contacts, opportunities, and more. Here's some of the most common terms, along with a quick explanation of each.

- **Contact**: The simplest of all, Contacts are the records for the people you've listed in your CRM. Just like in your address book, they can contain the names and personal info of your customers and clients. You'll likely also see Company and/or Account in your CRM; these are specialized contacts for the organizations you work with, and you'll likely link your individual contacts to a Company or Account.
- **Lead**: Some contacts are special: they seem likely to want to do business with your team in the future.

Leads are these special people, to whom you'll want to pay particular attention.

- **Opportunity**: Turns out, that lead was really interested, and you think you're going to be able to sell them your product or service. Now they're an Opportunity, and you'll want to list info about what exactly this opportunity is and track it in your CRM.
- **Quote**: You've worked with a Contact, turned that Lead into an Opportunity, and now you're almost ready to make a deal—and so you'll Quote them a price and the service or products they'll get for it. That's what Quotes are for—and no, it's not the place to store your inspiring business quotations.
- **Deal**: Everything worked out and you've sold your product—or perhaps it didn't, and the Opportunity fell through. You'll track both of those with Deals, which will show your Won and Lost Deals.
- **Profiles**: Typically, these would be the people inside your own company that are using your CRM app. Each

of them may have a Role, or a particular set of permissions in the app.

- **Campaign**: Marketing is one of the main reasons you'd use a CRM, and Campaigns refer to your marketing campaigns. As such, they'd list the contacts and companies most crucial to your next marketing campaign, along with results, notes, and more.
- **Tag**: Similar to tags in Gmail or metadata on your photos, tags give you a way to add extra info to a Contact, Deal, or anything else in your company. This extra data gives you more ways to filter and sort through your CRM.
- **Activity**: Activity in a CRM typically refers to anything that's happened in the app—new Deals, Contacts, Opportunities, or perhaps just a message from your colleagues. They'll usually be listed in a Facebook-like news feed so you can look over them easily.

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How Much Will a CRM Cost?

There are dozens of CRMs, and an equally diverse number of pricing plans available. CRMs are business tools, designed to help you make money and customized to fit specific types of businesses, and as such they're going to cost more than your typical smartphone app, but they don't have to break the bank.

The vast majority of CRM apps today are hosted web apps, and you'll usually pay a fee per user each month—and can also usually get started for free. Most CRMs will let you get a free account with a couple users and enough features to test out the app thoroughly, and then you'll want to upgrade once you bring in your whole team and start tracking everything in it. Then, full plans will likely somewhere between $15 and $30 per user per month for the average CRM aimed at small to medium businesses. There are both cheaper and more expensive options, and even a few open source CRMs like Odoo that you can run on your own servers for free.

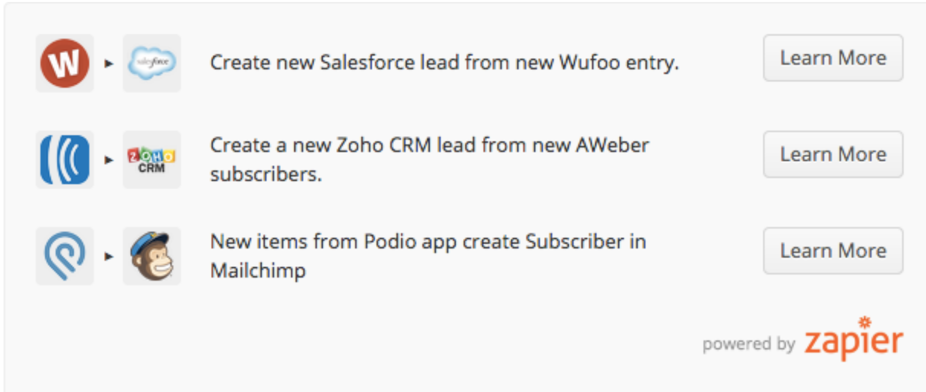
It's confusing to pick between all the pricing plans, features, and options, so we'll help you break it down and pick the best option for your team in the coming weeks.

How Do You Make the Most of a CRM?

Whether you need an app that'll tie your email threads together, one that'll help you spot the influencers in your community, or one that'll help you track deals and leads, a CRM will only end up truly helping you and your team out if you rely on it and find it necessary for your work.

"The key is to have the CRM become a productivity tool, and not a burden to people using it," says Jeremi Joslin, the founder of Collab-spot. "The CRM is there to help people do their jobs better and faster. Otherwise, nobody is going to update or maintain it."

That's why the best CRM apps integrate with the apps you're already using. They'll pull in emails and contacts, connecting the dots for you and leaving as little as possible for you to add. And often, the rest of the gaps can be filled in with a tool like Zapier.



Zaps:

- Create new Salesforce lead from new Wufoo entry
- Create a new Zoho CRM lead from new AWeber subscribers
- New items from Podio app create Subscriber in Mailchimp

“I'm someone who absolutely hates data entry and wasting time on manual processes that could be done automatically,” says entrepreneur Matt Mireles. “Zapier allowed us to automate a ton of stuff.” It’s automation like that, whether built-in or from another app, that lets you rely on the CRM to be the one place that has all of your contact info. You should never feel like you have to go search another app for relevant info; the CRM should be the the repository for your team's customer interactions.

> "The key is to have the CRM become a productivity tool, and not a burden to people using it."
>
> - Jeremi Joslin, Collabspot Co-Founder

Then, with all the selection, it can be tough to pick *one* CRM for your team. You can try out a ton, but at the end of the day, it's hard to make a bad choice. As Gray MacKenzie from GuavaBox says, "While window shopping can be fun, at some point you have to commit to a system to use." There are tons of great CRMs out there today, all of which can help your business. The important thing is making sure all of your info is flowing into the app, so you can trust it to be the place you'll always check first.

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So that's CRM in a nutshell. It's a category of apps that helps you make order out of the chaos of your normal business interactions, letting you focus on your customers instead of always trying to find out what was said last. And while that sounds complex, it's really not that much more complicated than your standard email and contacts apps—and once you learn to rely on the CRM, you'll likely find it takes you less time to use than your old email search habits.

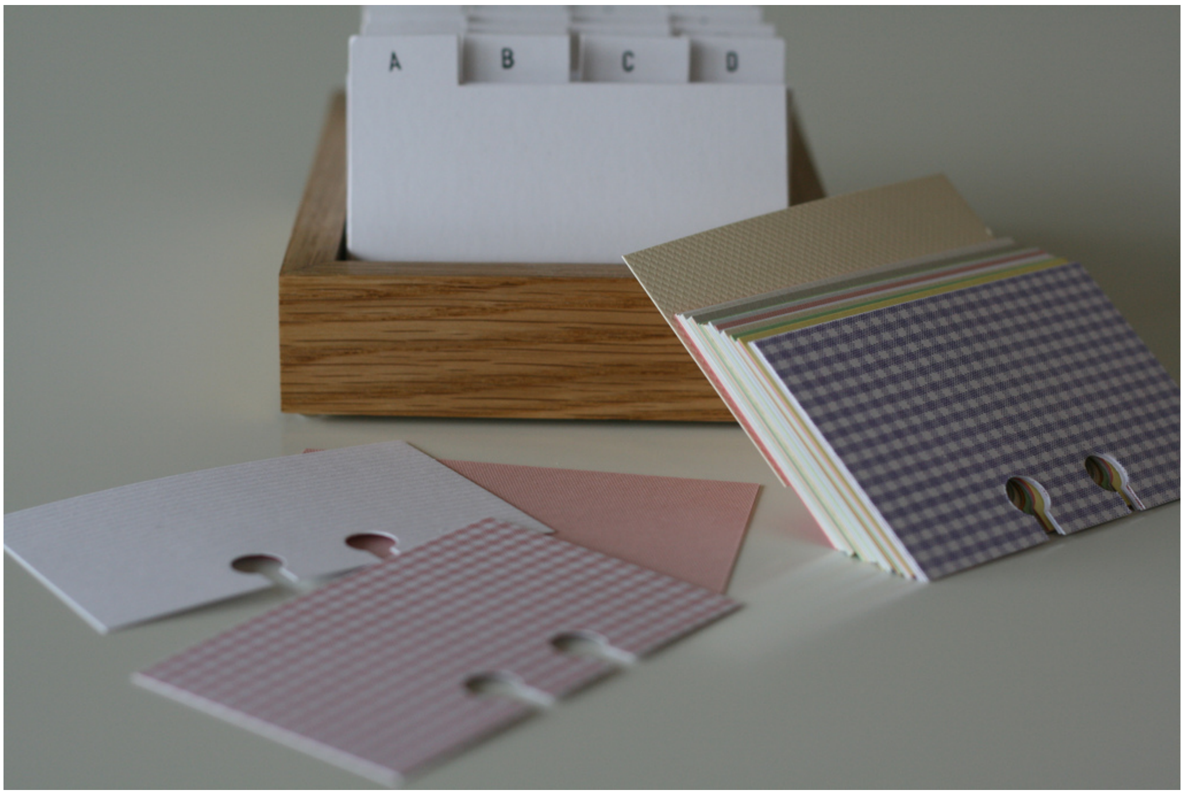
Next

Now that you know you need a CRM, it's time to find a CRM that'll work great for your needs. In Chapter 2, we'll look at the best features from over two dozen of the most popular traditional CRM apps, while in Chapter 3, we'll look at features from the best CRMs that can also automate your marketing.

Rolodex photo courtesy Myles Grant.

Handshake photo courtesy Big Omaha/Malone & Co.

Chapter 2: Choosing the Best CRM App



The 25 Best CRM Apps for Every Business

Managing your contacts didn't used to be so difficult. When you started your business, you had a handful of suppliers and customers, and few enough team members that you could memorize their email addresses.

Things change. That's good: business is growing and you have more people than ever to keep track of. You need a CRM—a **C**ustomer **R**elationship **M**anagement app—to help you keep track of everyone. We've explored why you'd want CRM software in the first chapter. Now, the question is: Which CRM is best for you?

There are CRMs of every form and fashion. They live in Gmail or Outlook, on your wrist or in your glasses. They can track the people you know, the deals you've won, and the conversations in between. And they can cost you an arm and a leg or be 100 percent free.

It's time to find a great CRM tool for your team. Whether that means you need a CRM for your small business, startup, nonprofit or large enterprise, or one for your role in sales, business development or public relations, one of the more than 25 apps in this list should suit your needs. Let’s dig in.

The Best CRM Criteria

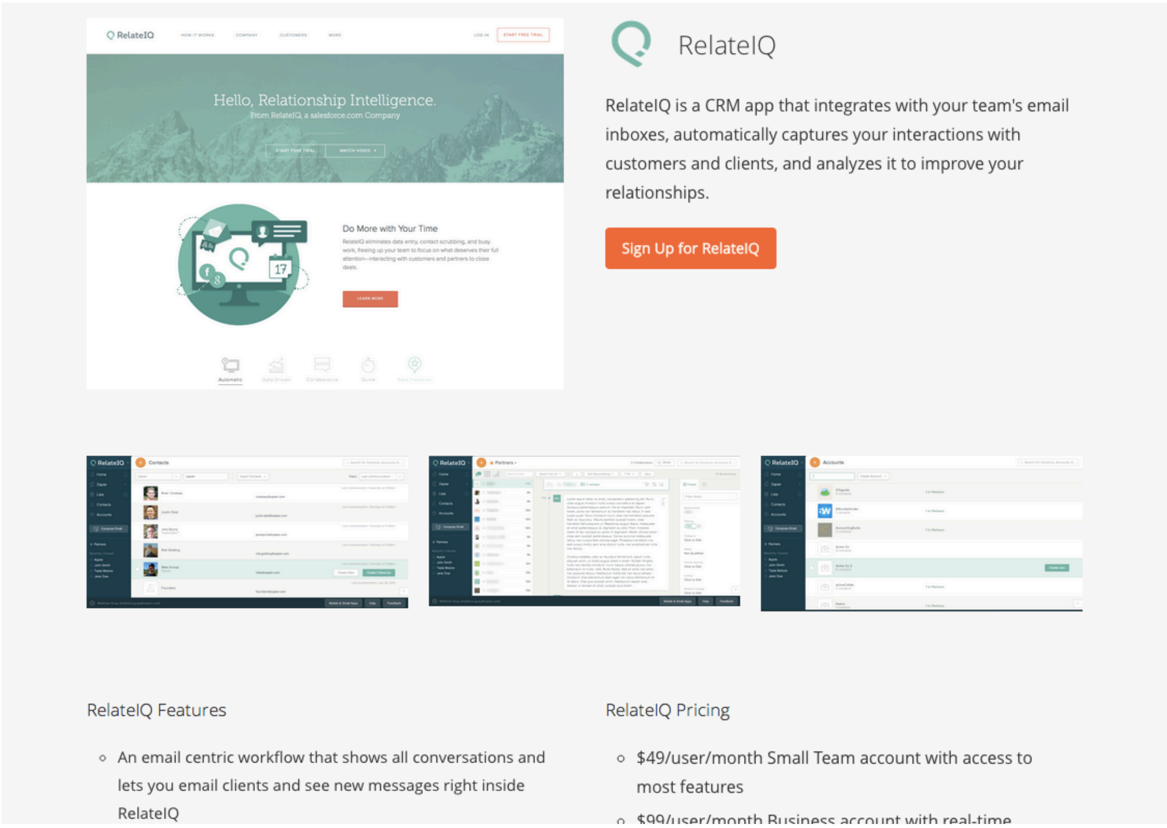
From the dozens of CRM systems available, there are surely a few that’d be better for your organization depending on what you’d like to track and how your team works. You’ll find everything from expensive apps you run on your own servers to customizable web apps with dozens of plans and features to the simple contacts app in Gmail. You could easily pay hundreds of dollars a month for a CRM, skimp by with a free app, or find something that’d fit your budget a bit better. And there are dozens of apps with CRM features that work with Zapier, meaning they’ll easily integrate with the other apps you use.

There’s no way to include every app with a CRM component, so we've applied a criteria to this inspection. Every CRM listed:

- Has unique features that make it worth considering

- Is relatively easy to use with little installation or setup time
- Works with Zapier, enabling you to integrate the CRM into your workflow

Then, we've grouped the CRMs by their type, and listed them inside each category in order from lowest cost to most expensive. Pricing is difficult to compare, since some CRMs charge a base price for a set of users and others charge per user. To average it out, we've listed the average price per user per month for the standard account that's not capped at a small (less than 10) number of users, followed by the number of people that can use it for free, if any. That should help you make a better direct comparison.



With each app description, you'll find a screenshot and price, along with a link to our review page (*sample above*) where you'll find more screenshots and details about the app's features and pricing plans. That way, you can find the apps that sound the most promising at a glance, then get more info about them to help you make your choice. It's also worth noting this doesn't include marketing platforms such as Intercom, Infusionsoft, and Interakt; those are covered in the next chapter.

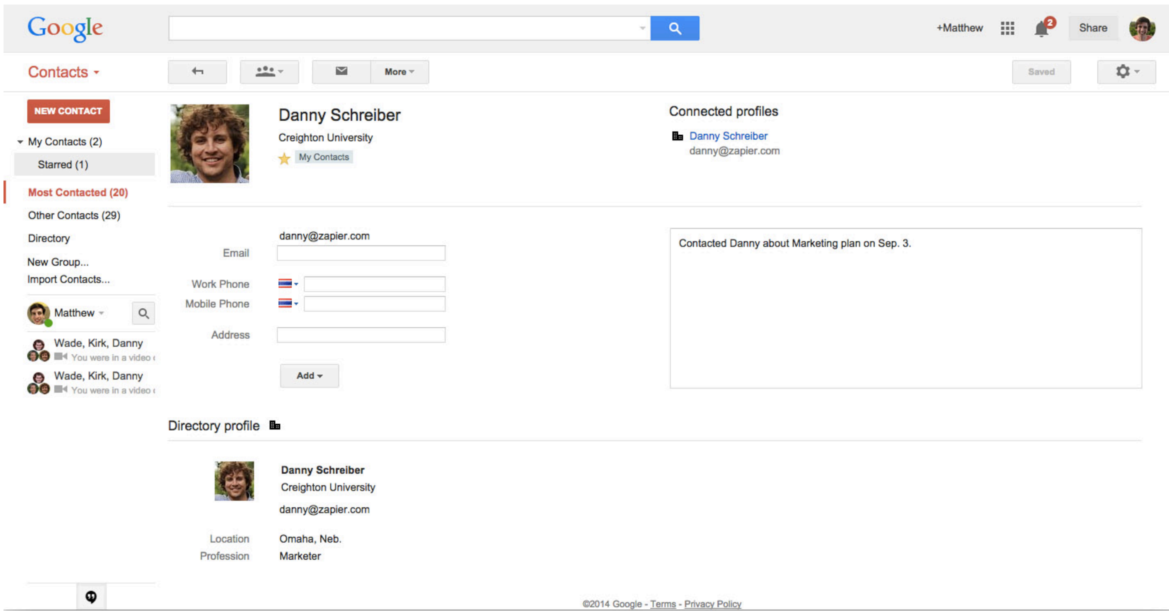
Sound good? Then here are the CRMs you should consider for your team, grouped by category and listed in order from the cheapest to most expensive.

Contacts

There's only a slight jump from a CRM focused on conversations to contacts, but it does make a difference. Where a conversational CRM works more like an email app—sometimes living inside your email app—a contact-centric CRM shows *people* front and center. You may still track the conversations, but they'll be centered around individual people, not the conversations themselves.

If you want to know more about the people you're interacting with, these are the CRMs for you. They're especially great when you need to meet clients and know everything about them at a glance.

Google Contacts



The last app you'd imagine could be on this roundup, [Google Contacts]() is of course just an address book that's built into Gmail. And yet, it's more than an address book. You can add just about any possible contact info to your contacts, and Google will automatically update contacts with their Google+ information, as well. Then, you can also keep plain-text notes on contact pages. That's a great way to track, say, info that you'd otherwise add to a contact's page in a CRM.

Then, there's an extra trick in the top right of the Google Contacts page. Tap *More*, and you can see a list of all your recent correspondence with that contact. Select an email, either there or in your inbox or anywhere else, and you'll see your contact's info on the right side like with many CRMs add-ons.

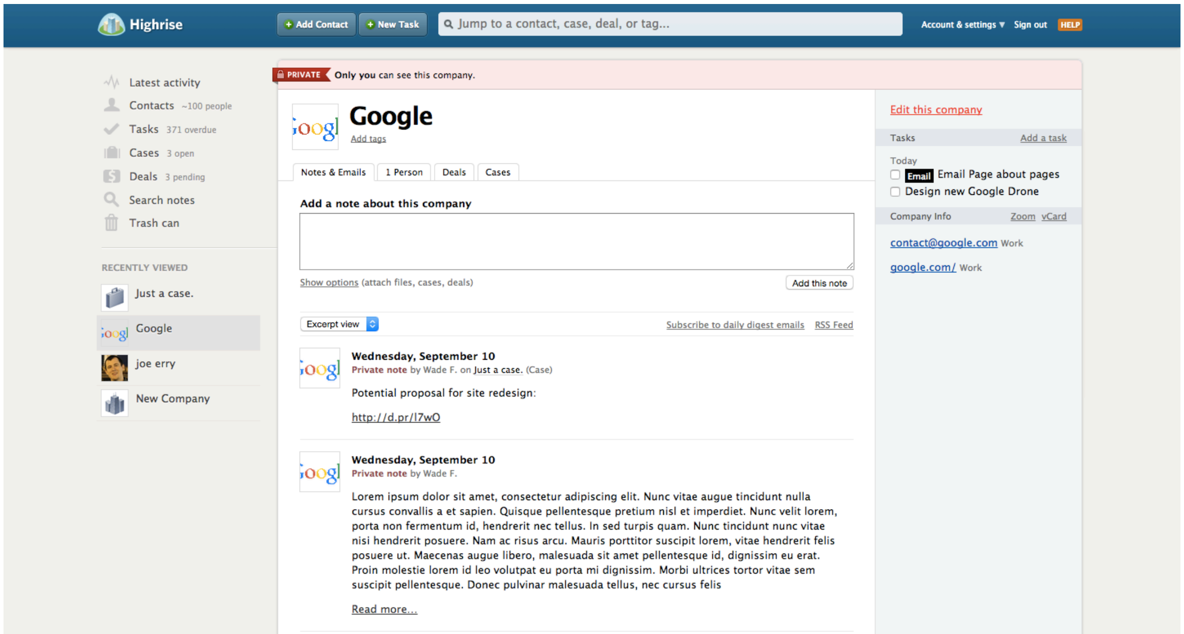
It's not marketed as a CRM, but put these features to use first and you'll have a part of the power of a CRM for free without even having to try a new app.

Price: Free; included with Google Apps for Work, starting at $5/user/month

For a deeper look at features and pricing, see our Google Contacts Review

> **Tip**: If you use Microsoft Outlook to sync your email, or really use almost any native email app and address book, it's worth noting that you can do some of the same things with your apps. Again, this isn't a "real" CRM, but rather a way to get more out of email+contacts.

Highrise



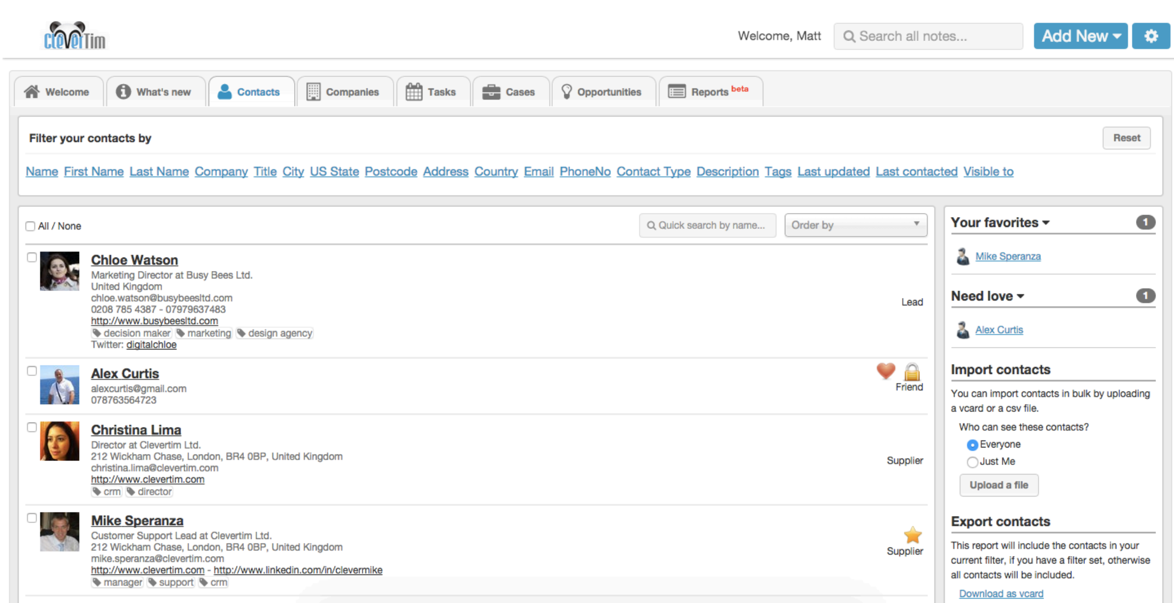
Imagine one piece of paper with every possible detail about your contacts, including all of their contact info, your tasks related to them, previous conversations and documents, and more. That, in a nutshell, is Highrise.

With a similar simple design approach as Basecamp, a project management app originally made by the same company, Highrise is focused on helping you know the most about your contacts, Highrise is focused on helping you know the most about your contacts. It also includes simple tools to track deals, so if you want a strong focus on your contacts but still want a way to track deals in progress, it's a great app to consider.

Price: Around $4/user/month; up to 2 users for free

For a deeper look at features and pricing, see our [Highrise Review](#).

Clevertim



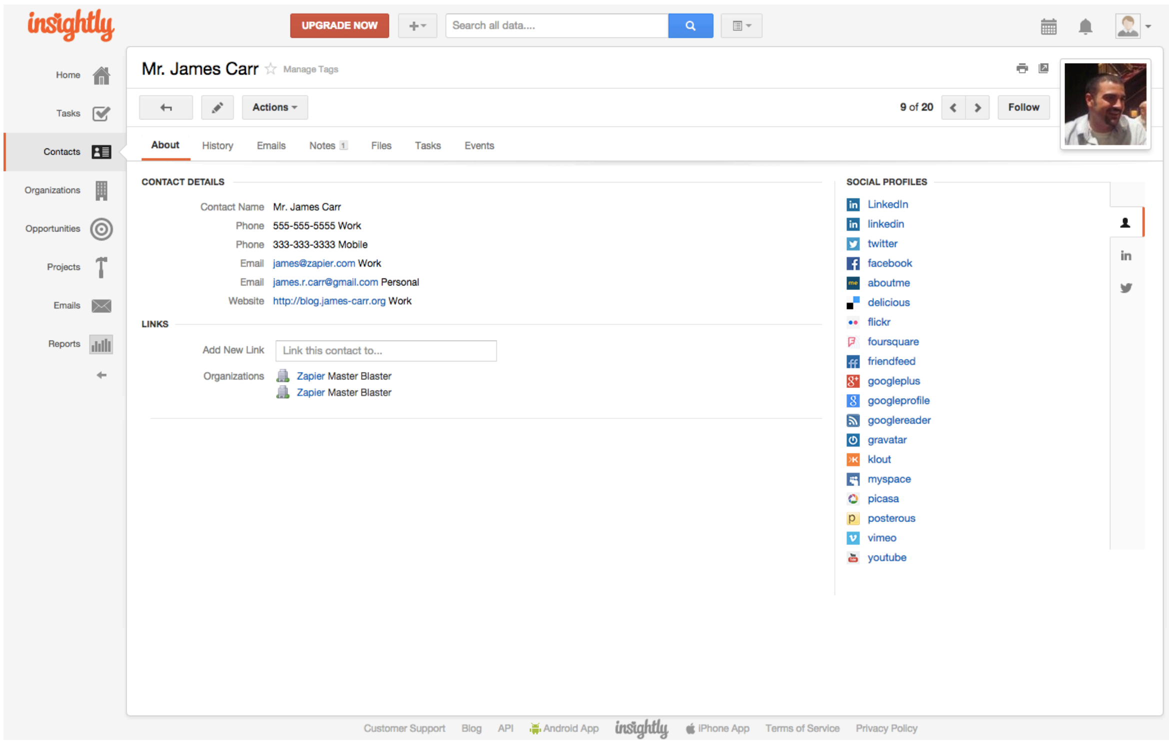
Perhaps you'd rather get a quick glance at your contacts' info without having to click through to their individual page. That's what [Clevertim](#) does best. It shows you a quick summary of your contact info right in the contact list, so if all you need is to look up an email or phone number you'll likely be able to do it without a click. You can then filter your lists easy by name, location, and more, to get even more details without having to click through to individual contact pages.

Then, if you want to handle cases, tasks, and even your teams appointments and meetings all in the same app, Clevertim has the features you'll need for that, too. It's a simple way to keep tabs on your company and contacts.

Price: Around $4/user/month; up to 2 users for free

For a deeper look at features and pricing, see our Clevertim Review.

Insightly



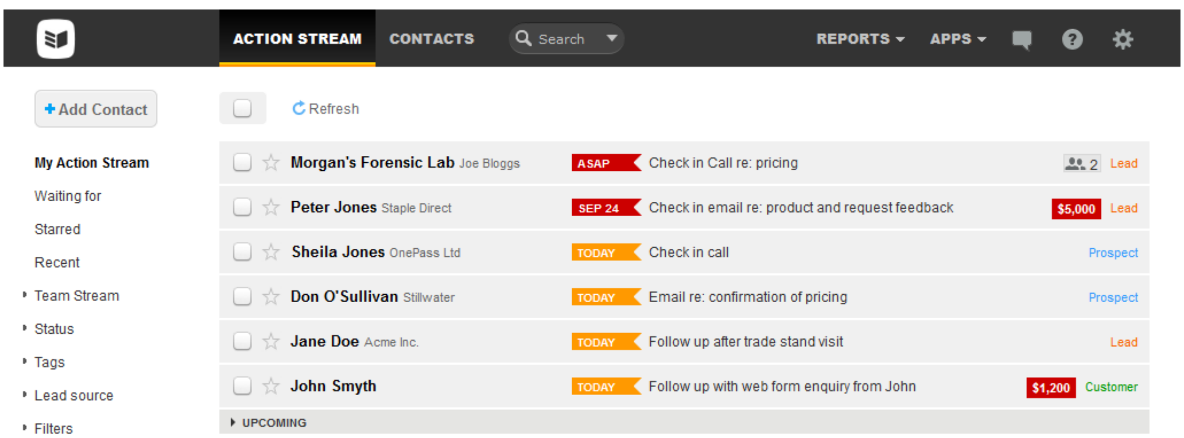
If you want more power than you can get with a CRM that lives inside Gmail, yet want the same interface you're already used to using, Insightly may be the app for you. It features deep Google integration and a design that's very similar to Google's apps, while giving you extra contact-centric features. But then, if you don't use Google Apps, it also works great with any other apps you use.

Insightly will automatically find your contacts' social network profiles, LinkedIn information, and more, and show it alongside your team's emails, notes, and tasks with that contact. There's then task management, advanced reports, and more that you'd expect from a full-featured standalone CRM.

Price: $9/user/month; up to 3 users for free

For a deeper look at features and pricing, see our Insightly review.

OnePageCRM



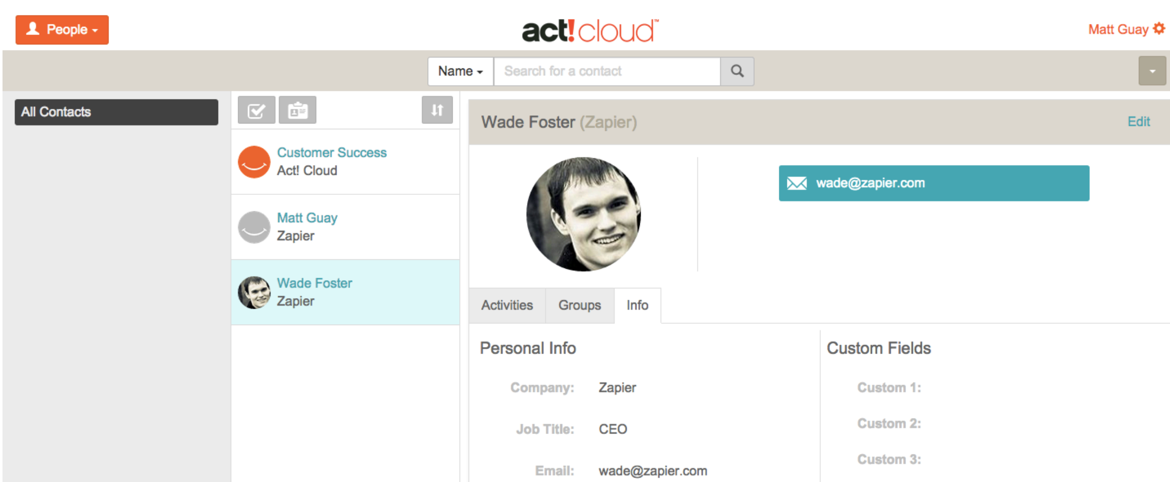
Want a really simple CRM? OnePageCRM may be just what the doctor ordered. It literally keeps everything on one page, and is surprisingly fast to use. You'll see your contacts on the front page in a list that shows quick information about them, and dynamically loads your contacts in the order they need contacted. Select one, and their info will load automatically in a pane on the right.

There, you can add notes, track emails, save tasks, and anything else you'd need about that content. The rest of your contacts are still just a click away, ready for you to work with them once you're done.

Price: Around $10/user/month

For a deeper look at features and pricing, see our OnePageCRM review.

Act! Cloud



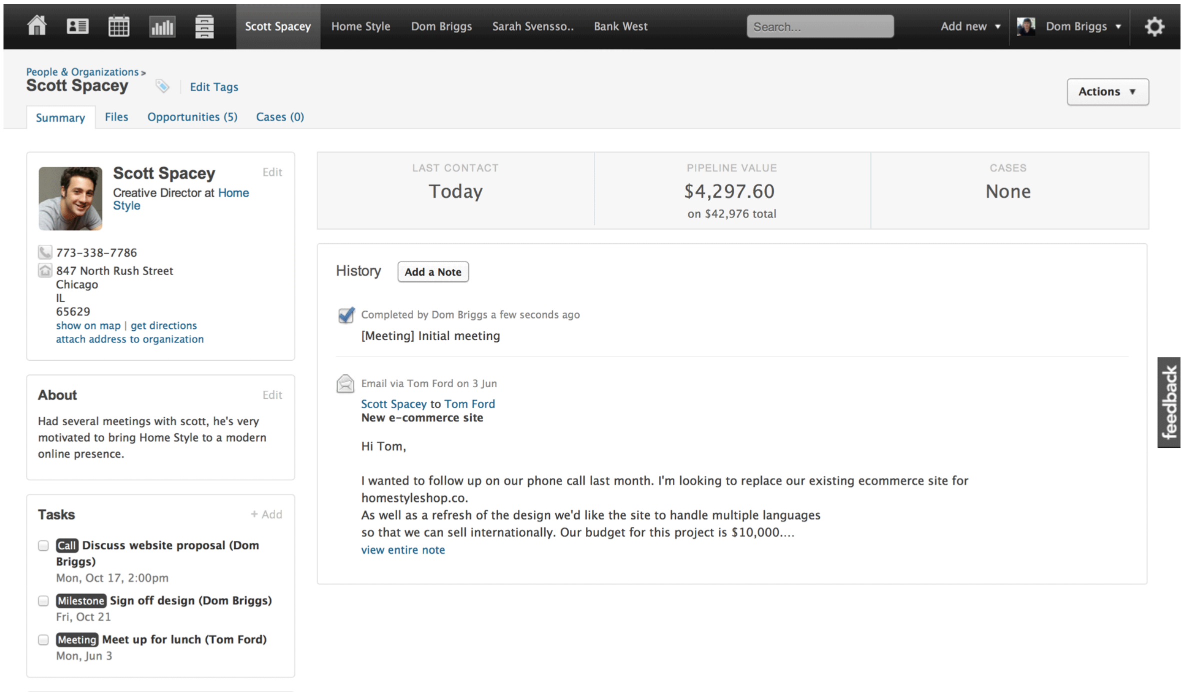
One of the very first CRM apps, the first version of Act! ran on DOS, and its name stood for "activity control technology". You can still run Act on your computer or servers today, but the newest version of Act runs in the cloud and is integrated with social networks.

The new Act! Cloud is an advanced contact manager that'll let you pull in your contacts from your email, Facebook, and LinkedIn accounts, then easily see when you've last contacted them. It's a great way to track interactions and know who you need to contact next, especially if you're working on your own.

Price: $10/user/month (Zapier support coming soon)

For a deeper look at features and pricing, see our Act! Cloud review.

Capsule



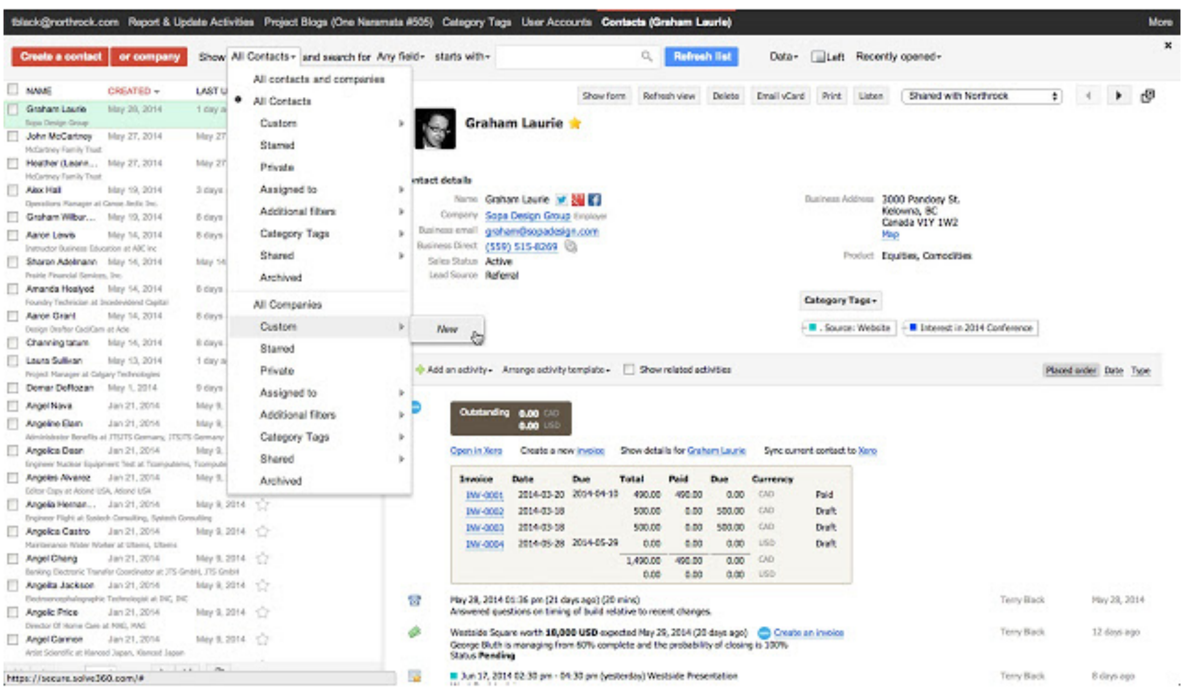
Keeping track of your customers is great, but there's a lot more people you need to remember: vendors, media, and even your team members. Some contacts might be important to one project, while others may fall in several of your categories. Capsule understands that, and makes your contact lists front-and-center.

You can organize everyone into lists that represent their relationships to each other and your company. Then, you can dive in and see how recently you've gotten in touch with each person, with your last interaction at the top of the page. It's a unique twist on a contact CRM that gives you a bit more power and automation.

Price: $12/user/month; up to 2 users for free

For a deeper look at features and pricing, see our [Capsule review](#).

Solve



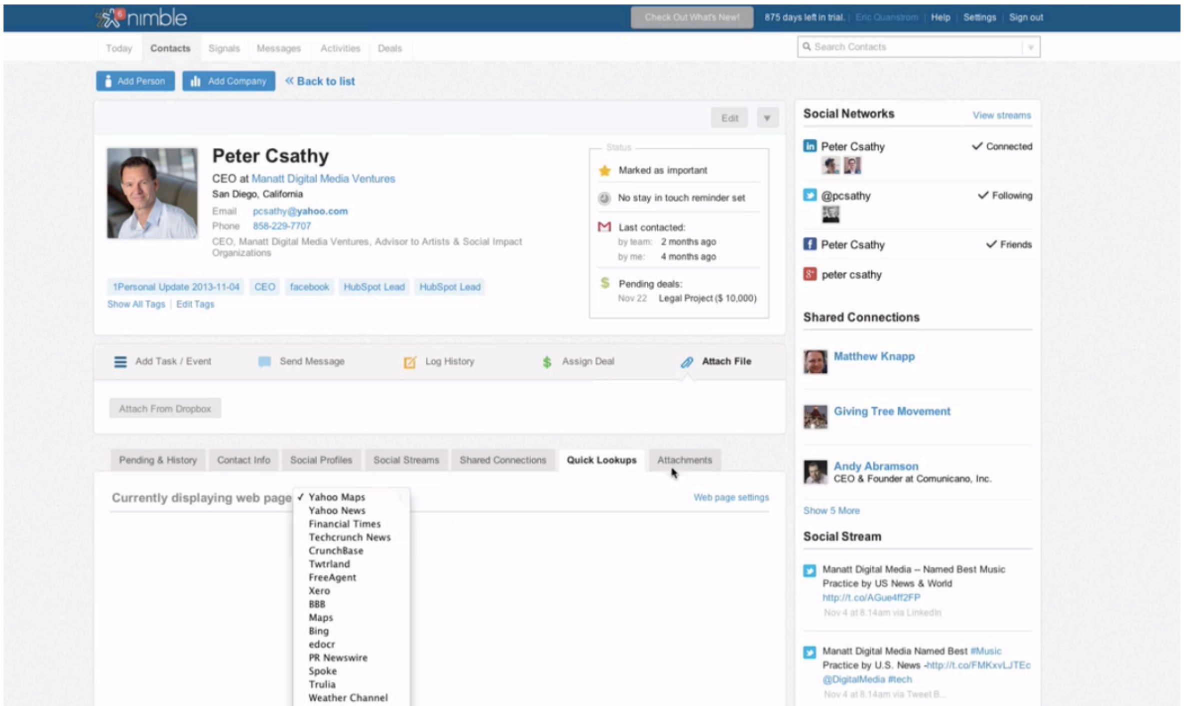
Everyone needs to track different things in their CRM, and use that data in different ways. Solve, well, solves that problem by being deeply customizable, with custom fields, tags, activity templates, and more that let you use it the way that works best for your team.

Then, it's deeply integrated with Google Apps to help you do more with your CRM data. In Gmail, it'll show your contact info below your emails so there's space for all the info. It then integrates with Google Sheets so you can make custom reports directly in a spreadsheet with your raw data. You can even mail merge and make personalized documents using Google Docs. If you're using Google Apps and want a powerful CRM, it'd be hard to pass Solve up.

Price: Around $13/user/month (min. 3 users)

For a deeper look at features and pricing, see our Solve review.

Nimble



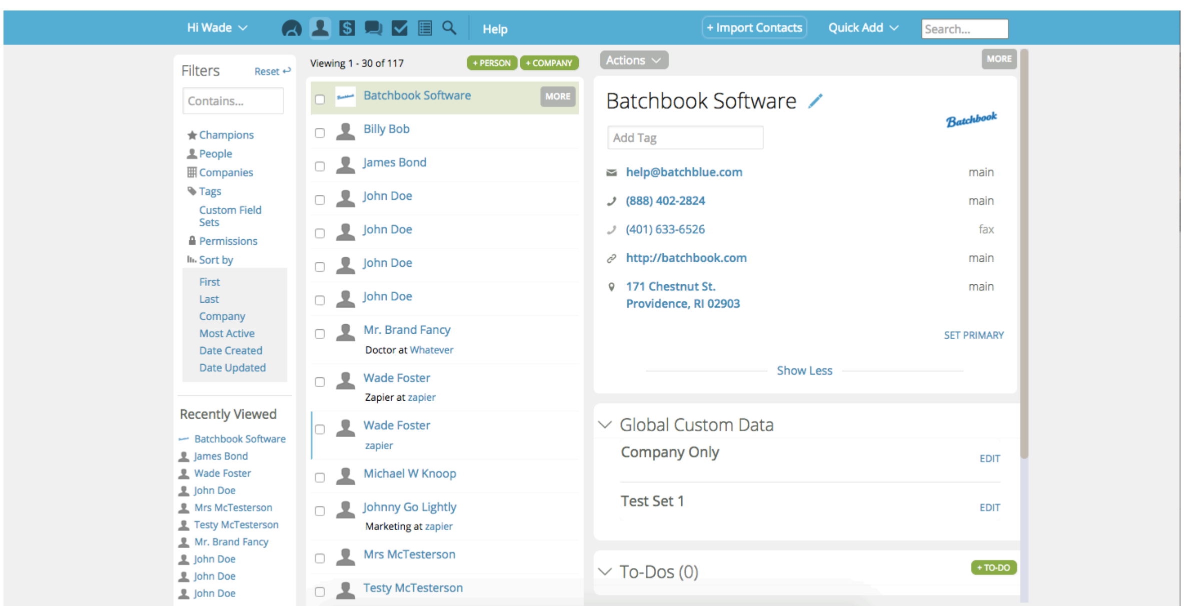
Staying in touch today means using social networks, collaborating on shared calendars, and emailing more than most of us want. [Nimble](https://www.nimble.com) pulls all of that in, automatically creating rich contact cards with your conversations from everywhere. It'll then smartly tell you who's the most promising and which people you should followup with today, along with your normal calendar appointments and more.

Then, it's also rather good at leads and deals, with a Kanban-style layout to help you lead your leads through your sales process. It's everything in one place, and it's smart enough to help that not feel overwhelming. Best of all, there's only one plan, so you'll never have to worry about needing to upgrade.

Price: $15/user/month for everything

For a deeper look at features and pricing, see our [Nimble review](#).

Batchbook



Many CRMs integrate with your email apps, and some even surface social media accounts and add contact info from them. Batchbook goes further by being fully integrated into Hootsuite. You can connect with dozens of social networks in Hootsuite, and see your CRM data right alongside from Batchbook.

Batchbook has another way it's more social: every plan includes unlimited users, so your entire company can easily use the CRM. That makes its upfront price look higher, but since every other CRM on this list charges based on the number of users, it'll likely work out far cheaper if you have a large team.

Price: $55/month for unlimited users

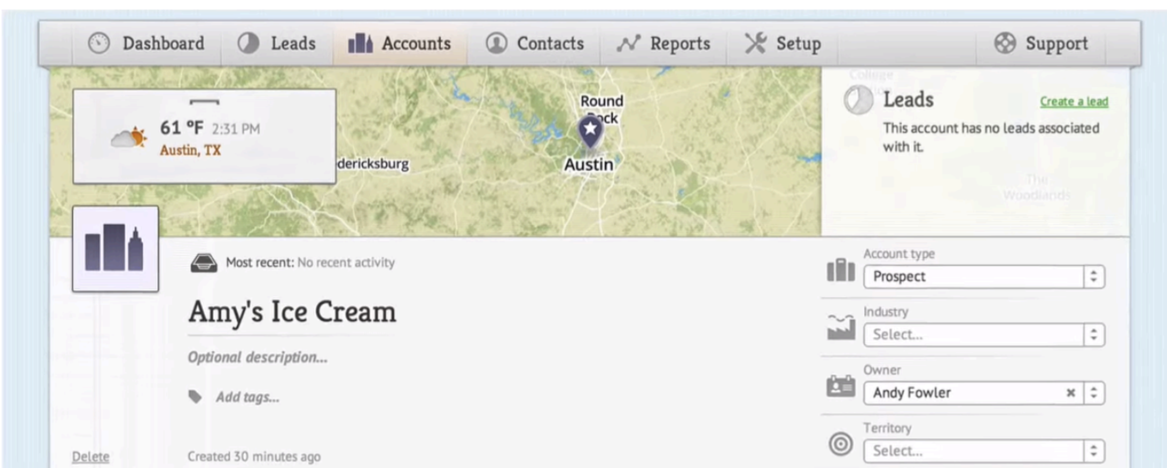
For a deeper look at features and pricing, see our Batchbook review.

Conversations

Your email account's "All Mail" list is a CRM of sorts. It shows the names of the people you interact with most frequently, along with your most recent conversations. It's just not very smart, so it won't surface conversations you should follow up or promising leads. That's why there's conversational CRMs. They'll live close to your email conversations, helping you know what's been said and when you should reply again.

If you're having trouble keeping up with the conversations with your partners, and perhaps have multiple people that might jump in on a conversation at any time, a conversational CRM might be what your team needs. They're especially great for tracking partners, building stories in newsrooms, and other more conversational processes.

Nutshell



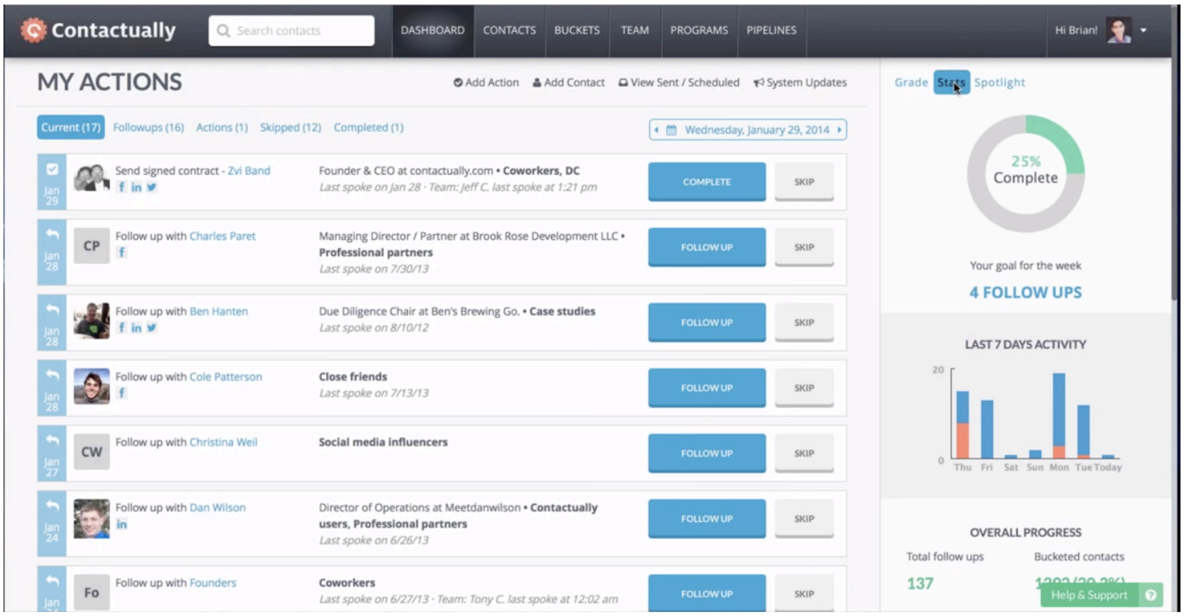
CRMs don't have to be boring. They're designed for serious work, sure, but they can also have a personality and make your workdays a bit more fun. Nutshell does just that. It'll pull in your Gmail conversations and show you what needs your attention today, but then will also show extra info about your contacts like the current weather and time in their location and their Twitter profile info.

It's still a fully professional CRM, though, with detailed contact info, simple tools to track leads, and reports about your team's performance. Combine that with its cute UI, and it'll add a bit of whimsy to your CRM experience while still giving you the power you need.

Price: $15/user/month

For a deeper look at features and pricing, see our Nutshell review.

Contactually



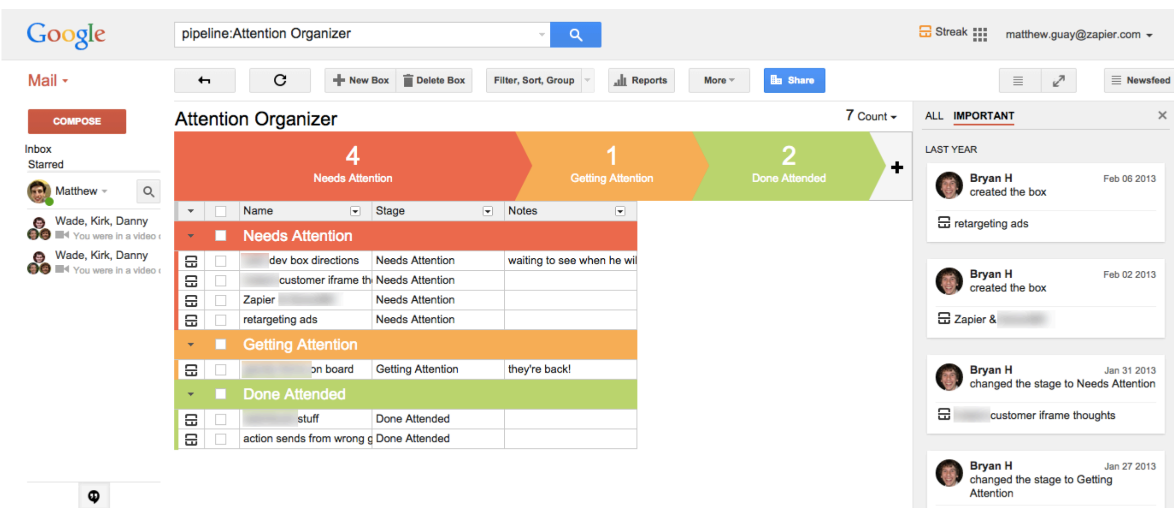
Yes, its name starts with "contact", but Contactually is actually a great app for conversations. It's built around email, with customizable email templates to help you quickly send emails, and bulk mailing to personalize emails even if you send them all at once.

Then, its dashboard is organized based on who you need to contact again, based on your last emails. You can followup via email right from the app, and rate your performance based on how well you've stayed in touch. This is an app designed just to ensure your conversations keep going.

Price: $18/user/month

For a deeper look at features and pricing, see our Contactually review.

Streak



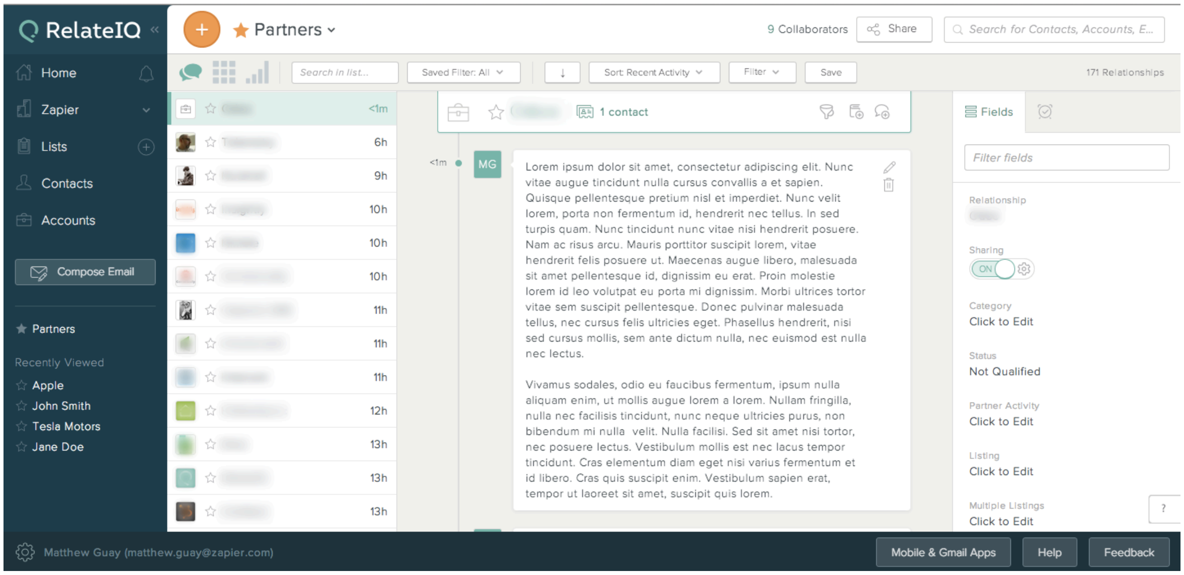
Since your email inbox is already a CRM of sorts—one that sorts your conversations by how recently you've received them—the simplest CRM could be a shared email inbox. That's what Streak gives you, along with a handful of Gmail power features.

With Streak, you can share email conversations with your colleagues inside Gmail, organize messages in pipelines, and add notes to conversations that your whole team can see. It's customizable, so you can use it for a wide variety of email uses from CRM to support. There's also tools to remind you of important messages, or delay sending emails until a specific time, which are handy extras to have in your email inbox aside from CRM features.

Price: $19/user/month for up to 10 people; free for up to 5

For a deeper look at features and pricing, see our Streak review.

RelateIQ



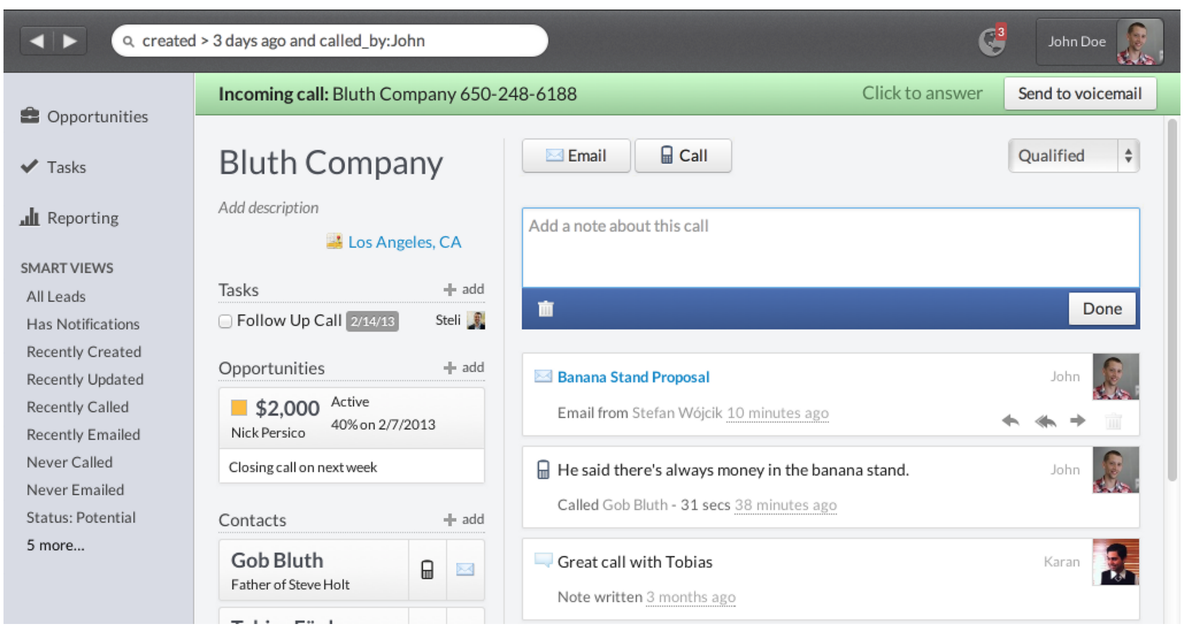
What if you had an assistant who read your entire team's emails, found the conversations from contacts that were most important, and shared them with everyone who needs to know about those conversations? That's RelateIQ.

It's been recently acquired by Salesforce, but couldn't be more different from the app that launched the CRM web app business. RelateIQ has perhaps the most unique UI of any CRM in this list, and rather than being filled with customizable database fields, it's just focused on your conversations. You add your email accounts, select conversations you'd like to share, and collaborate on them with your team. It'll pull conversations from all contacts at the same company together, so you'll get an overview of your team's relationship with that company.

Price: $49/user/month

For a deeper look at features and pricing, see our [RelateIQ review](#).

Close.io



What RelateIQ does for email conversations, [Close.io](#) does for phone conversations *and* emails. It's built around phone integration. You can make sales calls right from the web app, logging, recording, and even transferring them to other sales agents right from the app. Whenever someone calls your company, you'll see their contact data complete with your previous conversations automatically.

Even in reports and individual contact views, Close.io is designed to help you get in touch easily with one-click phone and email links. If you want the quickest way to get in touch, and do more of your work over the phone rather than in email, Close.io is the app to try.

Price: $59/user/month

For a deeper look at features and pricing, see our Close.io review.

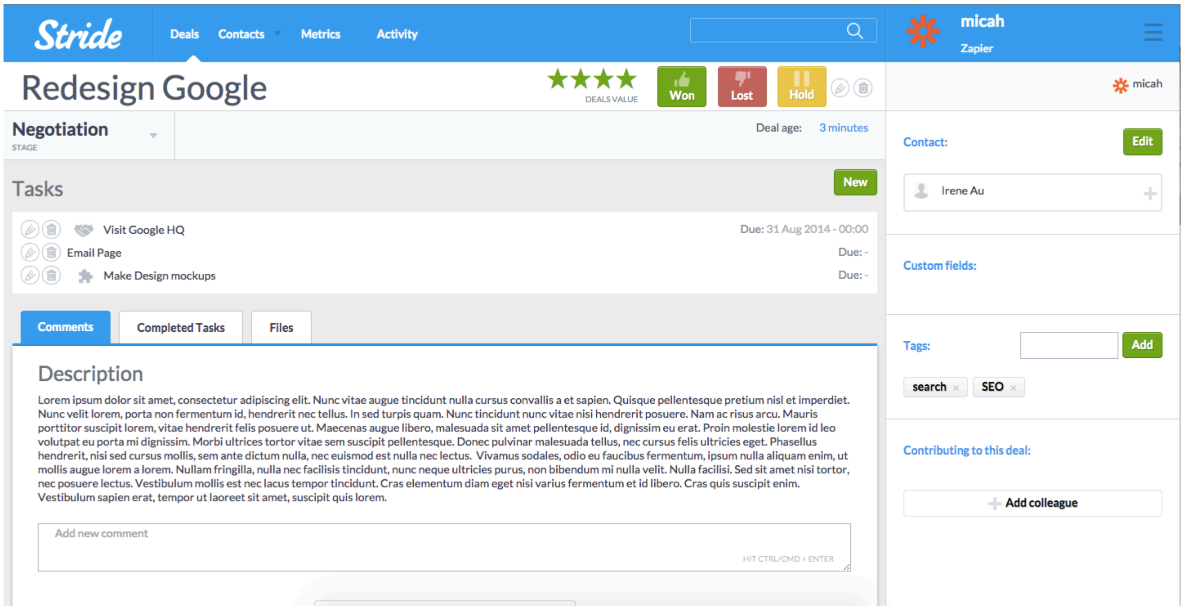
Leads and Deals

Salespeople made CRMs a popular category of apps, since they could track the people who potentially might buy the product and then make sure you follow up until you actually close the sale. That's why CRMs focused on Leads and Deals are what you'd think of by default when you're thinking of CRM.

Some of the biggest names in CRM, from Salesforce to Oracle and Microsoft's on-premise offerings, and even the older CRM apps that started this field of software in the '90s, are all lead and deal CRM. Their basic idea isn't so different from the contacts CRMs, as you're still using them to track people. The only difference is, these apps are designed around moving contacts through a sales process, where they start out as a lead that potentially might buy your product and turn into a deal.

That's why these CRMs are perfect for sales teams—the original CRM customers—where the other types of CRMs might be better for other use cases.

Stride



CRMs are among the more expensive apps you'll use, so Stride's price tag comes as a shock: it's free. Recently acquired by the investors behind KISSMetrics, Stride sports a new design and the lowest price of any app on this list aside from Google Contacts.

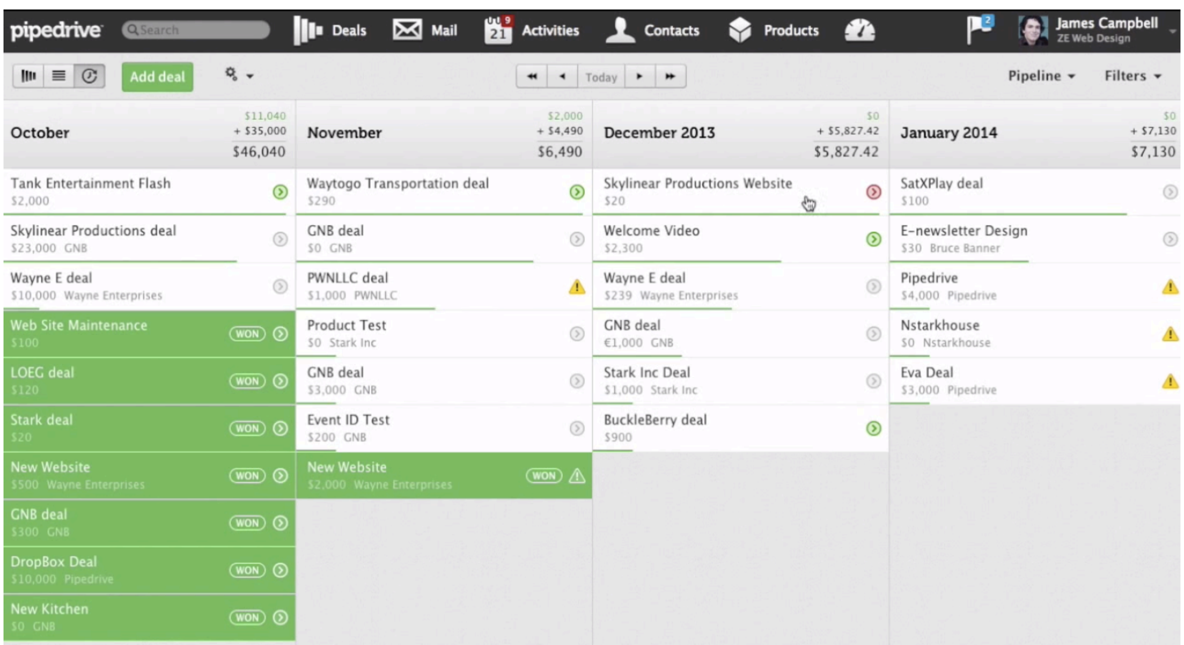
It's also one of the simplest lead and deals apps to use. It's got a full Kanban-style board to drag your leads through the deal process, but each deal also just has a simple red or green button for lost or won to easily categorize your deals. You can then customize your stages and deal fields to make it work the way you want.

It's perhaps the most basic lead and deal CRM in this list, but is also the easiest to use, and its price is hard to argue with.

Price: Free

For a deeper look at features and pricing, see our [Stride review](#).

Pipedrive



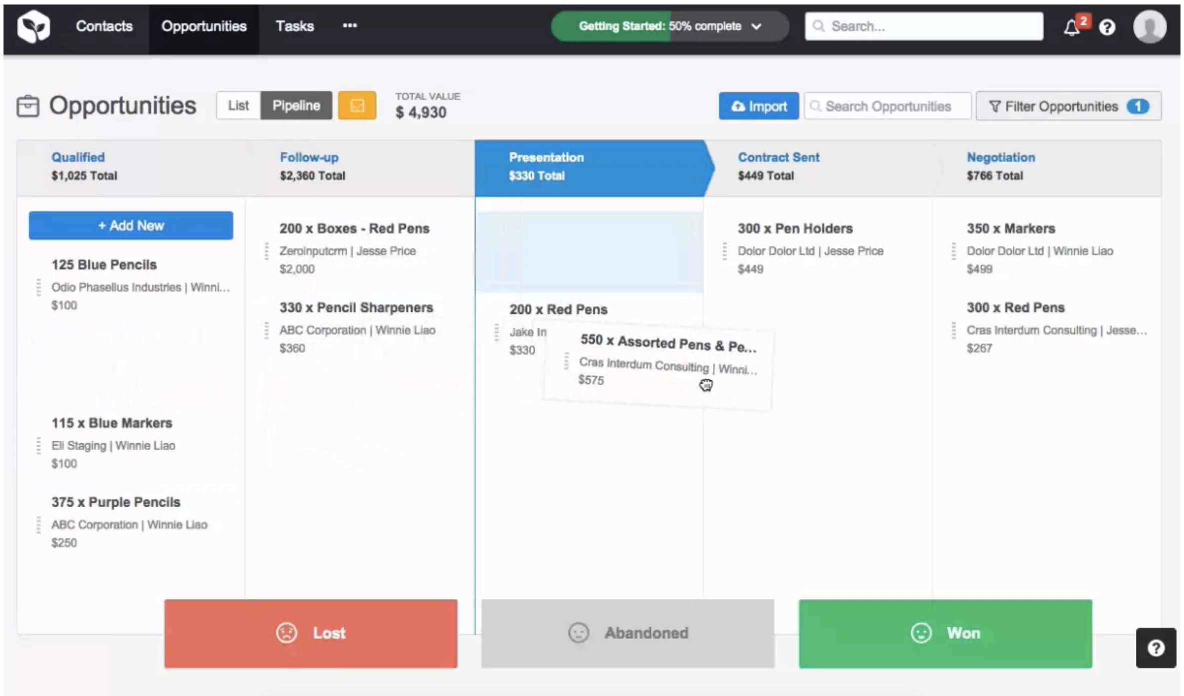
Some apps show just one thing, while others give you some overviews of your sales process with a Kanban board. [Pipedrive](#) shows you *everything* in easy-to-view boards that let you see what's going on in your CRM at a glance, no matter which part of the app you're using.

You'll see your deals in a sales pipeline, one that you can filter down to see just want you need. Then, you can see a Timeline view of how your deals have progressed, an easy way to see an accurate sales forecast for the months ahead. And when it's time to check your monthly reports, you'll find they use your same sales pipes to show how you've been productive.

Price: $9/user/month

For a deeper look at features and pricing, see our Pipedrive review.

Prosperworks



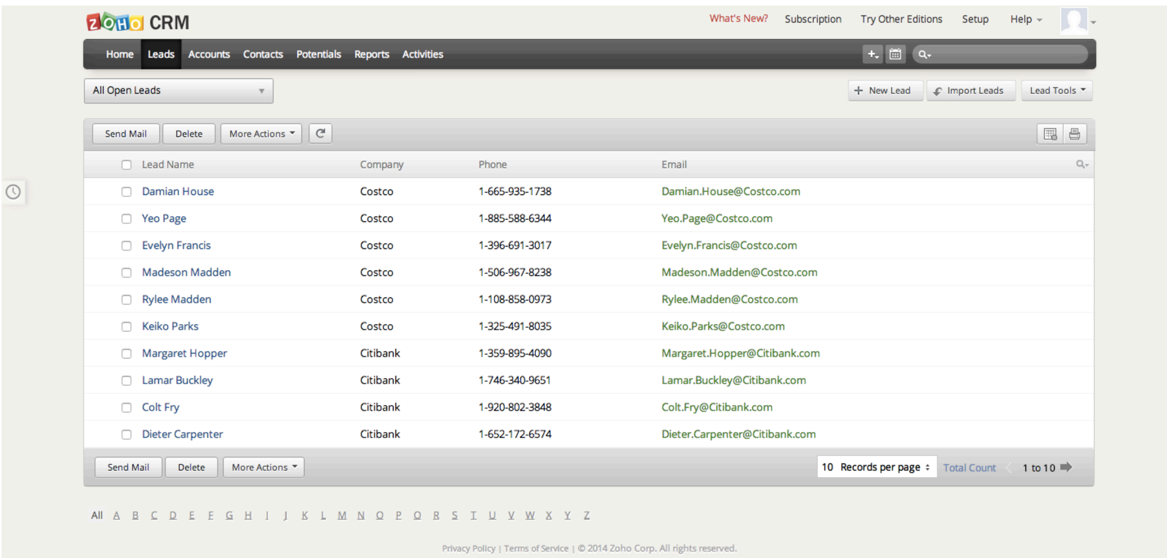
Just because you're tracking leads and deals doesn't mean you can't also keep up with your contacts and conversations. [Prosperworks](#) has a nice blend of all three with its deep Gmail integration that makes it simple to get all of your CRM info automatically entered.

Prosperworks will watch Gmail for new contacts and let you easily turn them into leads. You'll then be able to see all of your conversations in one place, turn them into opportunities, and move the opportunities through your sales process on a Kanban-style board.

Price: Free (currently in beta; Zapier support coming soon)

For a deeper look at features and pricing, see our [Prosperworks review](#).

Zoho CRM



Zoho's suite of apps includes everything from word processing and spreadsheet apps to a hosted email service and accounting apps. There's also [Zoho CRM](#) in the mix, an app that's reasonably priced while providing many of the features you'd expect from an advanced CRM.

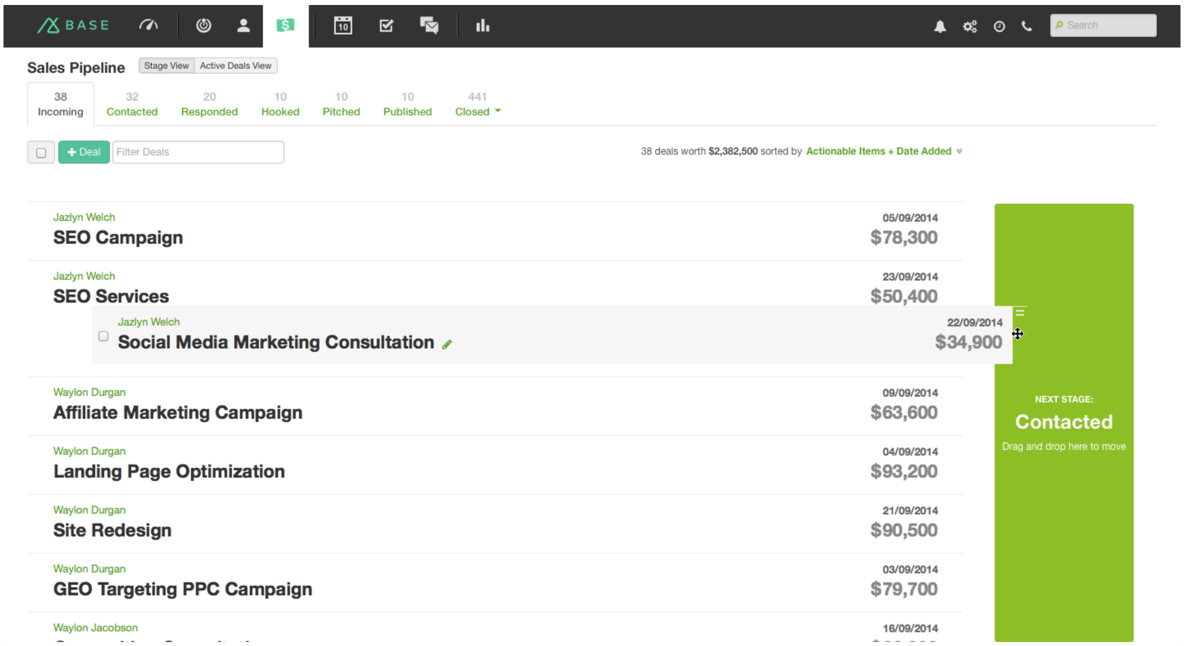
You can capture leads from forms on your site or Facebook page, automate your workflow to bring those leads through your sales funnel, and use the Pulse and Forecasting tools to know what's most promising. You can then use its integration with Zoho to mail merge documents from your contacts, email them and start video conferences from the app, and more. Plus, you can extend it with custom modules to make it the CRM that works just like you want.

Price: $12/user/month; up to 3 users for free

For a deeper look at features and pricing, see our Zoho CRM review.

> **Tip**: Zoho also has a new offering—Zoho CRM Plus—that includes their CRM, social integration, and their new SalesIQ marketing automation tool for $50/month per user.

Base



The majority of CRMs show everything at once: all your contacts in a list, all your pipeline stages on one screen. With Base, that's simplified down to just what you need to do next. You'll look at a step of your deal process, and just see that one step and a bar for the next step so you can drag deals directly to their next stage.

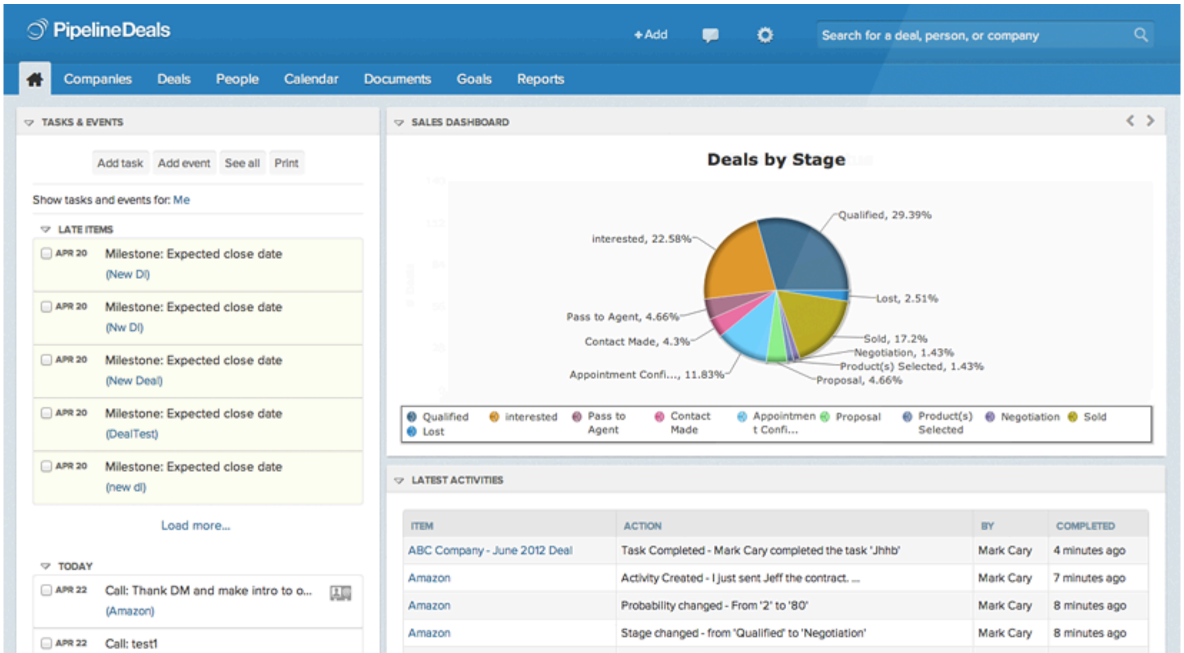
It's not just the workflows that Base simplifies. It also simplifies your contact info, showing truncated views of your recent conversations, notes, and calls on a page that's easy to scan at a glance.

And when text isn't enough, Base lets you pick up the phone and call or SMS message your contacts right from inside your CRM. You can log calls and record them, right alongside the emails and notes you'd track otherwise. It'll be the one place for all of your communications, even if those are over the phone.

Price: $15/user/month

For a deeper look at features and pricing, see our Base review.

PipelineDeals



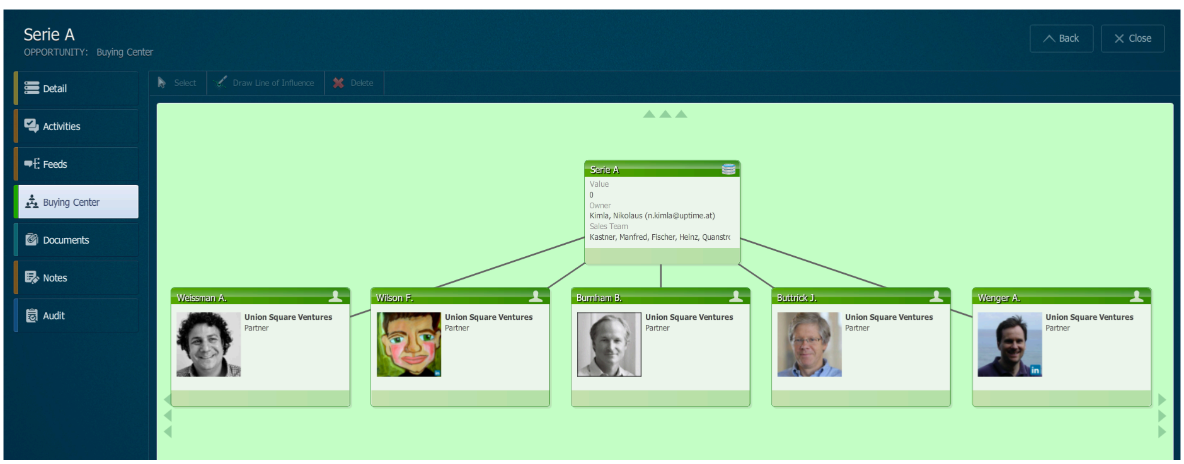
When you start your work day, you need to see what needs to be done today. Many CRMs show the most important conversations or leads that need contacted, but PipelineDeals shows everything right on the dashboard. You'll see your team's latest activities, the tasks that are due most urgently, along with charts about your current deals and their progress. And, you'll get a daily email that summarizes what's going on, so you'll be ready for the day as soon as you check your email.

Then, PipelineDeals makes it easy to find the lead or task you need, with a simple sentence style sort field that lets you write naturally what you're looking for. It'll help cut through the clutter, too, in addition to showing you the big picture.

Price: $24/user/month

For a deeper look at features and pricing, see our [PipelineDeals review](#).

Pipeliner



It's easy enough to link contacts together and list the stages of your deals, but it's another thing to see it all in action visually. [Pipeliner](#)

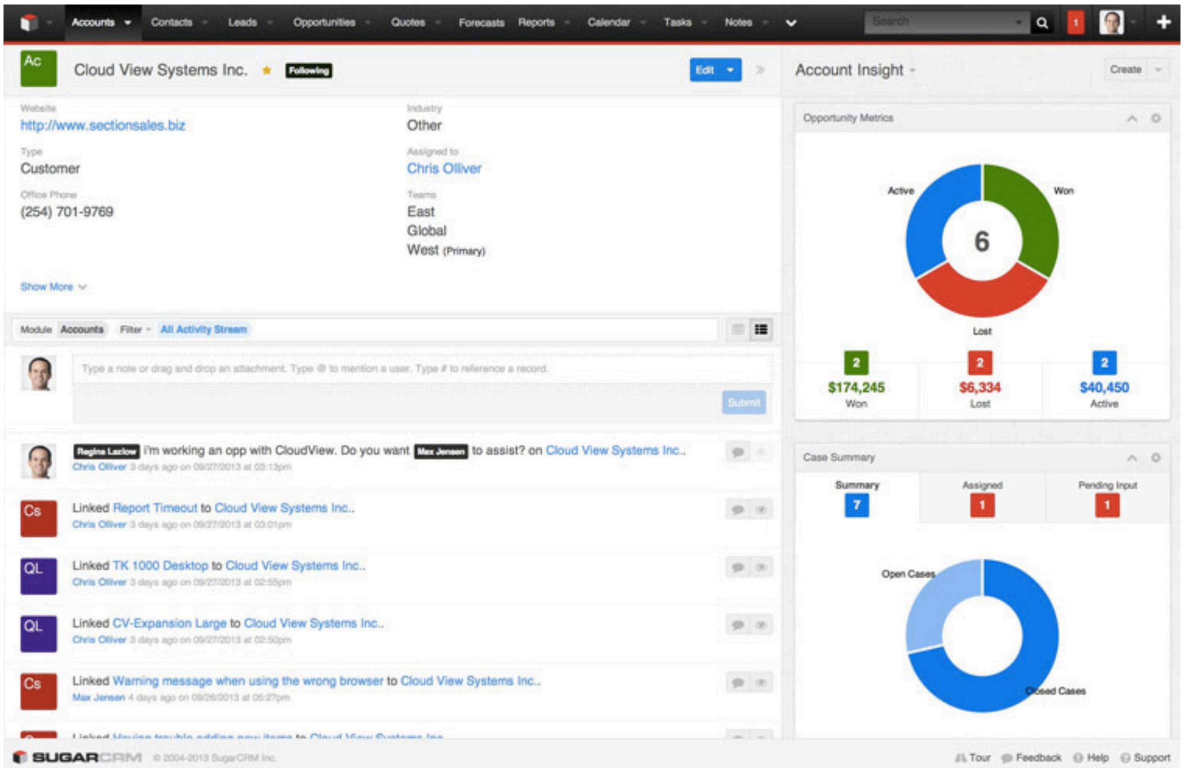
turns every part of your CRM into graphics, so you can see how your contacts and deals go together.

You'll organize your leads and deals on a Kanban-style board, then link your contacts into groups in a mindmap-style editor so you can see how everyone's linked. Then, there's native Mac and PC apps for Pipeliner, so you can take your work offline, too, if you can't always work online.

Price: $35/user/month

For a deeper look at features and pricing, see our Pipeliner review.

SugarCRM



Sales are important, but the most important thing is the people that you're selling to. SugarCRM keeps that in mind with its contact-focus even as it's a powerful CRM for tracking leads and deals.

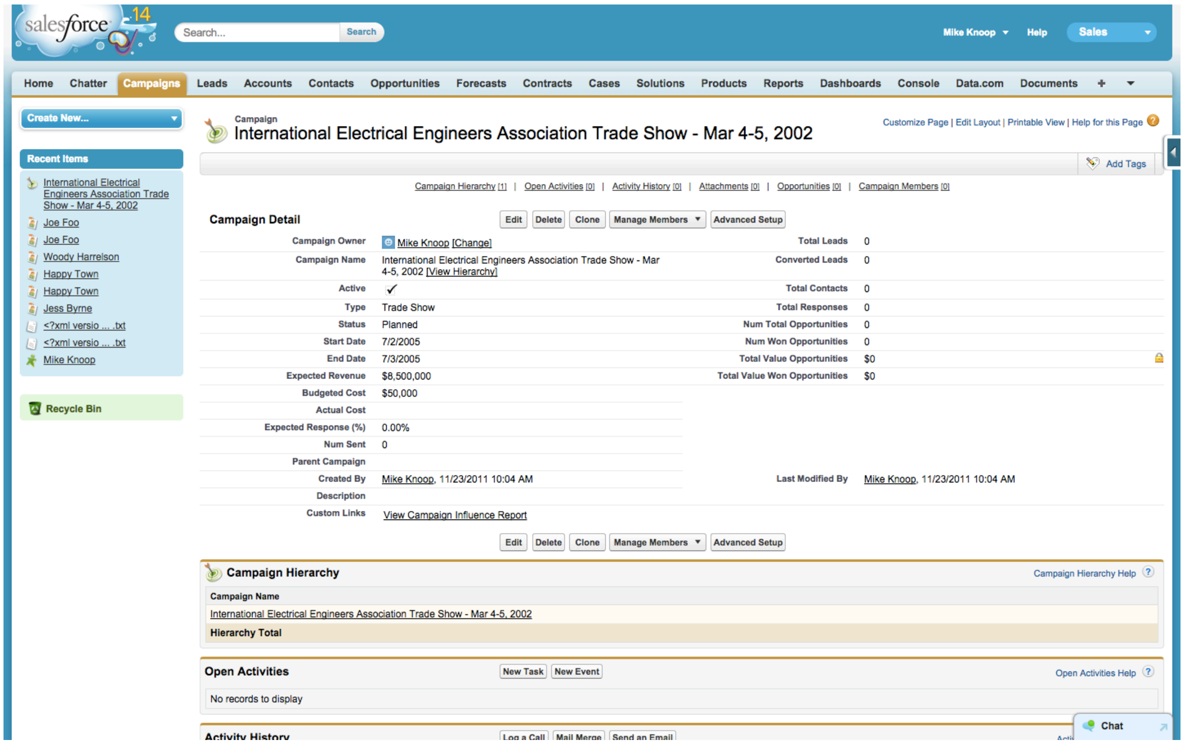
You'll find detailed contact and interaction info on each contact's page, right along with graphs that show insight into this account with the number of deals you've won and lost with them. Combine that with deep app integration and analytics, and you've got a sales tool that'll help you know a lot more about your customers.

Then, if you'd like a CRM that you can tweak and run on your own servers, SugarCRM is the CRM for you. Its full-featured open-source Community Edition lets you easily install and run it from Linux, Windows, or OS X, and tweak it to work just the way you want, for free.

Price: $35/user/month; free Community Edition to run on your own servers

For a deeper look at features and pricing, see our SugarCRM review.

Salesforce



Web apps with APIs that let them integrate with other apps are such a common thing today that there's over 350 that work with Zapier. And yet, in 2000 when Salesforce first launched, the very idea of having an app in your browser was revolutionary. Salesforce was one of the very first web apps with an API, and it's that legacy that keeps it one of the most popular CRMs today.

Salesforce is actually a platform: there's the Salesforce1 Platform, an online database you can use to build your own apps, or use the

Salesforce CRM and Support apps that are built from it. The CRM still holds similarities to the original Salesforce, complete with perhaps the most dated interface on this list. Its database backend, though, makes it more customizable than most. It also includes some of the best reporting and prediction, along with customizable workflows, automation, and team-specific dashboards.

Your data's what matters. Once you have that, you can show it in infinitely different ways that make sense for each task you need to do. With Salesforce, that's not only possible—it's built-in.

Price: $65/user/month

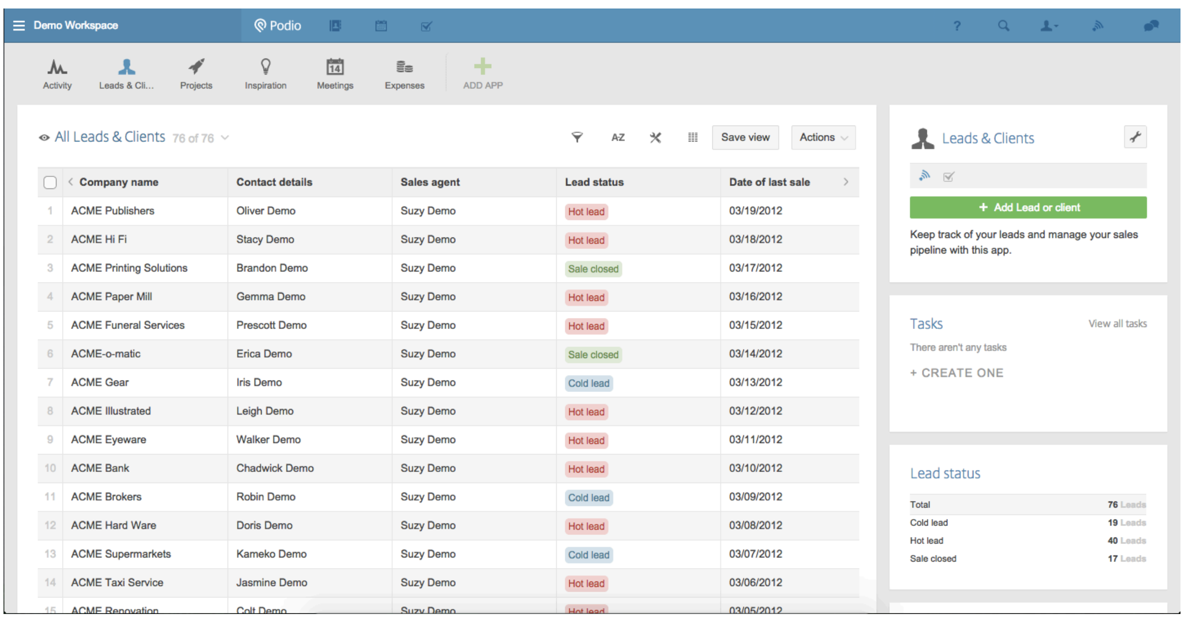
For a deeper look at features and pricing, see our Salesforce review.

Multipurpose CRMs

Many CRM apps do more than just track your contacts, leads, and deals. Base and Close.io lets you make calls and send SMS messages, Insightly also lets you manage your projects, and Zoho CRM is deeply integrated with the other apps in the Zoho suite. Then, there's the CRMs that are actually just one feature of a much broad-er application. These apps typically let you select a number of apps —including a CRM—and use them together in one place.

If you're looking for a CRM but also would like to consolidate your work in one place, here are some of the best multipurpose apps with CRMs for your team:

Podio



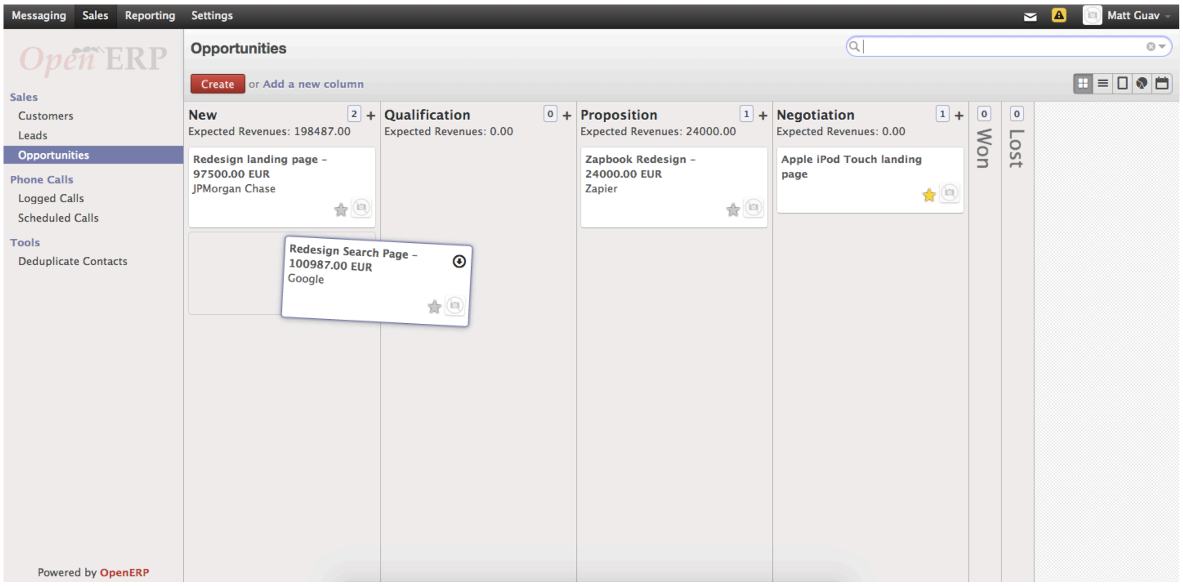
Need apps for your business? How about 700 of them, all with the same interface and a notifications system that'll make it easy to keep up with what's going on in any of them? That's Podio.

Now run by the Citrix team, Podio has everything you could want to run your business—including a lead-and-deal focused CRM, along with a dedicated Contacts app. Each of the individual apps are perhaps simpler than similar stand-alone apps, but together they provide a way to integrate all of your company's work in one place—and you could build your own apps if you want. There's also built-in group chat, social network-style status updates, and more to help everyone keep in touch.

Price: $9/user/month; up to 5 users for free

For a deeper look at features and pricing, see our Podio review.

Odoo (formerly OpenERP)



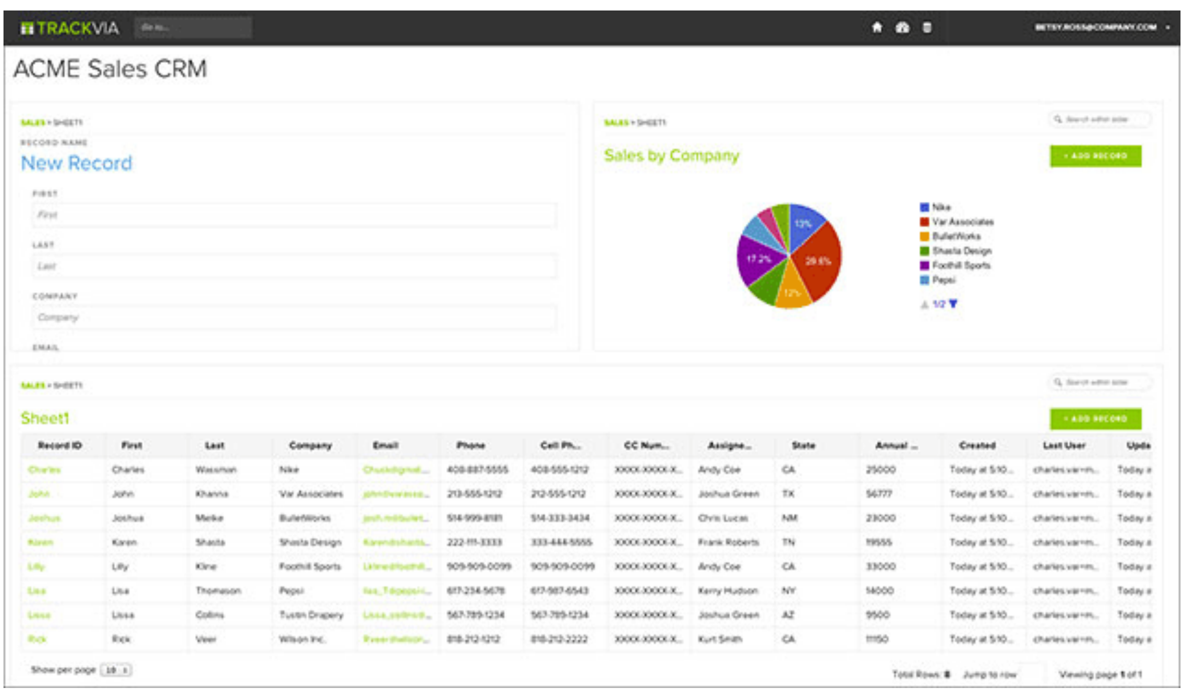
Hosted web apps are nice, but sometimes it's nicer to just run your own apps on your own server. Odoo lets you do just that. Similar to the WordPress open-source CMS, Odoo is an open-source app platform for your business that includes over 30 business apps that you can install and run together on your own servers for free. Or, you can get the same features without the trouble by signing up for an Odoo account.

It's not just the apps that make Odoo great. There's also the hundreds of integrations with financial organizations, supplier apps, and more that'll help you integrate Odoo with your work. It's aimed at enterprises, with a design more on the lines of Salesforce, but isn't quite as difficult to start using as you might expect despite its interface.

Price: $15/user/month for each app; free to install on your own server

For a deeper look at features and pricing, see our Odoo review.

TrackVia



If you're not using a CRM, you're likely already keeping up with your contacts, leads, and deals some other way. There's a good chance you're using a spreadsheet. Most CRMs will let you upload that spreadsheet and add its data automatically, but TrackVia does even more: it lets you turn that spreadsheet directly into a CRM app that works the way you want.

TrackVia is a tool for building your own database-powered apps online, with pre-made designs for CRM, project management, and other popular apps. You can customize these as you'd like, or just start from scratch and use its features to build your very own CRM. If you already know how you'd like your dashboard, reports, and forms to look, this is the app you should try.

It'll take a bit more time to get setup, but if you want something truly personalized with just the features you want an *nothing* more, it's hard to find anything more customizable than TrackVia that's not far more difficult to use.

Price: $19/user/month (min. 10 users)

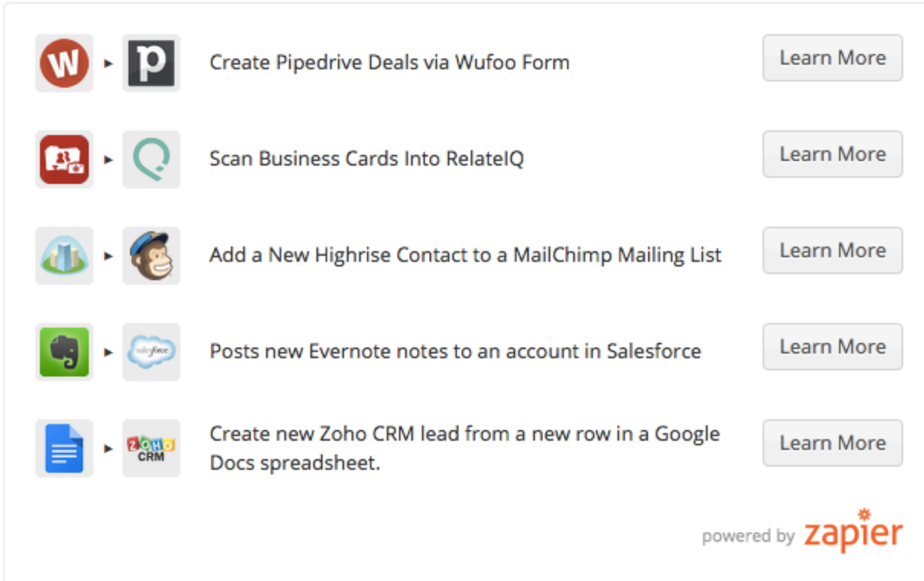
For a deeper look at features and pricing, see our TrackVia review.

> **Tip**: If you'd like to build your own CRM, two other options that may work would be Zoho Creator and Knack. Neither have built-in CRM tools to customize, but you could use their database features to build your own CRM if you wanted.

Putting Your CRM to Work

Now that you've found a great CRM for your team, it's time to put it to work. Depending on the CRM you selected, you should be able to either automatically import your leads from a spreadsheet or sync with Gmail or Outlook to import your conversations and contacts. But going forward, you won't want to have to manually import contacts or copy data from your CRM to other apps.

That's what Zapier's for. It can link all of your apps to your CRM, so you don't have to manually copy anything. Here are some of the best ways to get your CRM and other apps integrated—and if you're using a different CRM app, you can still do the same thing on your own in the Zapier dashboard.



Zaps:

- Create Pipedrive Deals via Wufoo Form
- Scan Business Cards Into RelateIQ
- Add a New Highrise Contact to a MailChimp Mailing List
- Posts new Evernote notes to an account in Salesforce

- Create new Zoho CRM lead from a new row in a Google Docs spreadsheet

That's far from all. There's dozens of other ways you can automate your CRM, which you can find in the last chapter of this book.

Of all apps you'll pick for your team, a CRM might be among the most difficult to choose. There are so many, with such similar features, and yet such different workflows and use cases.

That's good. It should mean that you'll get a CRM that's perfect for your team, one that works the way you do. Hopefully the descriptions and reviews listed here will help you make your decision. If not, try out the ones that seem the most promising, see which fits your team the best, and then settle into it.

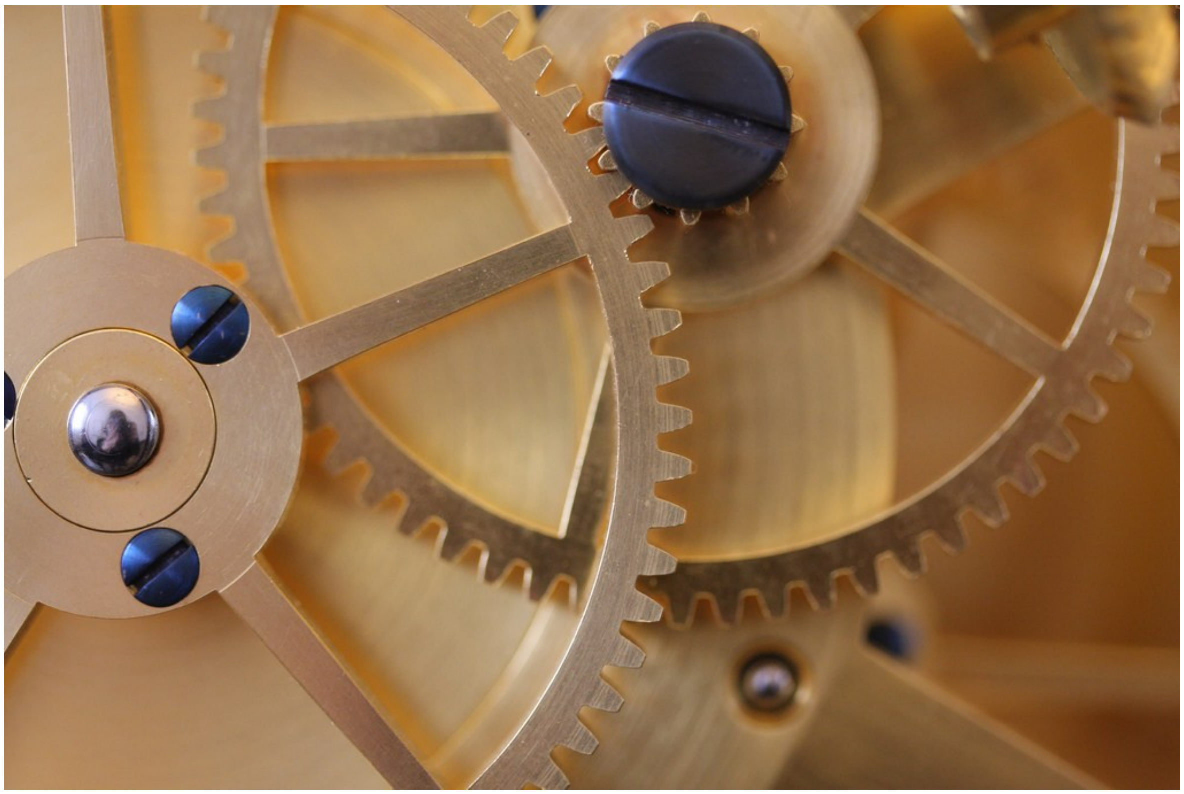
Next

Or, perhaps you'd rather use a CRM that does a little more—one that manage your contacts *and* helps automate your marketing efforts. If so, the next chapter's for you: it covers the best features in ten of the most popular CRMs with marketing automation features.

If a CRM that manages your contacts, conversations, or leads and deals is enough for your needs, though, you could jump ahead to Chapter 4 to learn how other teams picked their CRM and tips from them on integrating the CRM into your workflow better and get the most out of it.

Header photo courtesy prettyinprint on Flickr.

Chapter 3: CRM Marketing Automation Apps



Go All-In-One: 10 CRMs with Awesome Marketing Automation Features

Your potential customers are only potential customers for a fleeting period of time. They'll visit your site, perhaps try out your app, check out your menu or look through the services you offer. But if they get bored, can't decide what they need, or just don't see how your offering solves their problem, they'll leave and never return.

There are plenty of businesses that rely on close personal relationships, where that have a hand-picked set of leads that their sales team works to turn into deals. They need to track what's said, note personal details about the contact, and make sure they know when they need to follow up. That's where the dozens of great traditional CRM apps come in, as we looked at in chapter 2. They're tools that can help your business track all of the info about your customers, your conversations with them, and convert them from leads into deals.

But some businesses need a bit more. When everyone who stops on your site or downloads your app is a potential customer, you just might find a marketing automation CRM is what the doctor ordered. Here are some of the very best, and how they'll work for your company.

Inside a Marketing Automation CRM

There are ways to automate activities in almost every CRM, especially if you tie in your other apps with Zapier. You can have new contacts automatically added to your CRM when they've filled out a form, and then automatically emailed a personal follow up note two weeks later—or just about anything else you can think of that'd be helpful for your business.

But marketing automation apps with CRMs go much further. They tie directly into your site or app, adding all of your users into the CRM as soon as they sign up. They'll then monitor your site stats, showing how people discover you, which parts of your site they've seen, and then point out the people you focus on in your marketing efforts. They'll even automatically email your users to make sure they don't forget about your product.

It's the smarts of an analytics app, tied to a rich customer database that'll help you personalize your marketing while at the same time automating tediousness activities away. They're best aimed at web- and app-centric companies, and when they're tied in with all of the other apps your team uses, they're a powerful tool to help market your products. They're not for every business, but if you need a better way to identify potential customers and automate the sales process, they might be for you.

A marketing automation app will take a bit more time to set up than the traditional CRM. You'll likely need to copy a bit of code from the tool after you've created your account, and embed it into your site or app. Once you've done that, though, the apps here will do the rest of the work for you, identifying your visitors and clients and automating most of the CRM heavy lifting you'd have to do in other apps.

App Criteria

Just as in our roundup of standard CRM apps, there are a few criteria we use to select the apps here. Every app in this list:

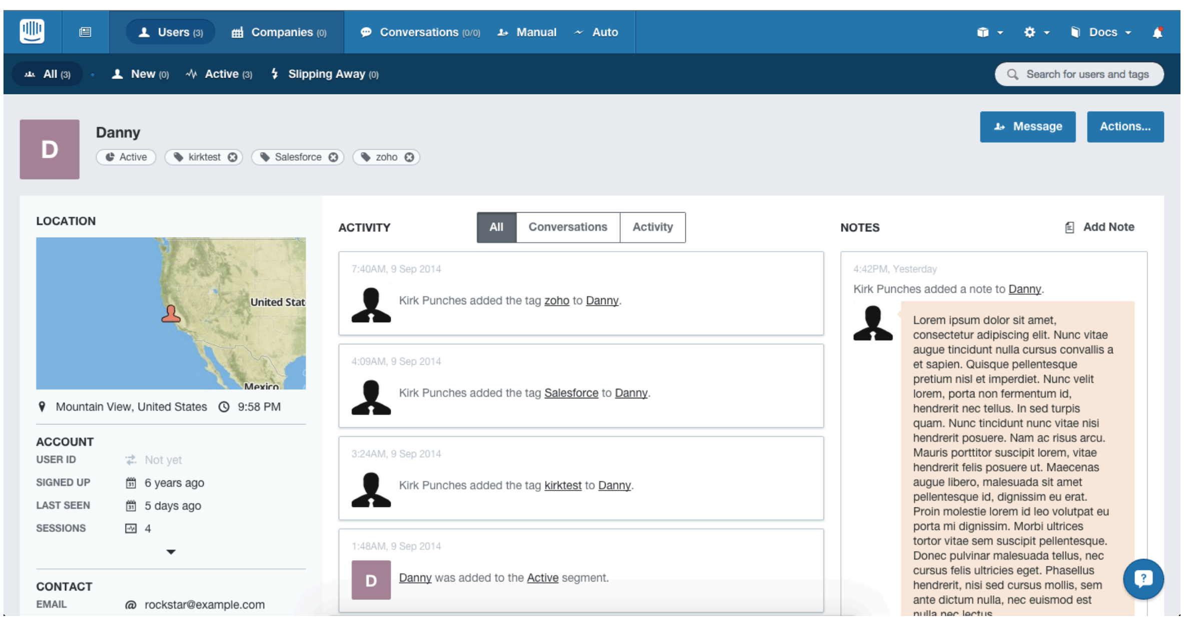
- Has unique features that make it worth considering
- Is relatively easy to use (though since these apps track your customers and site visitors, they all require a bit of setup time)
- Works with Zapier, enabling you to integrate it into your workflow with the apps you already use

You'll find a description of each app and what it does best, along with a screenshot, average price per user for the standard plan, and a link to our review page where we've listed detailed features, pricing plans, and more.

Sound good? Then let's find a great marketing automation CRM for your team.

The Best Marketing Automation CRM Apps

Intercom



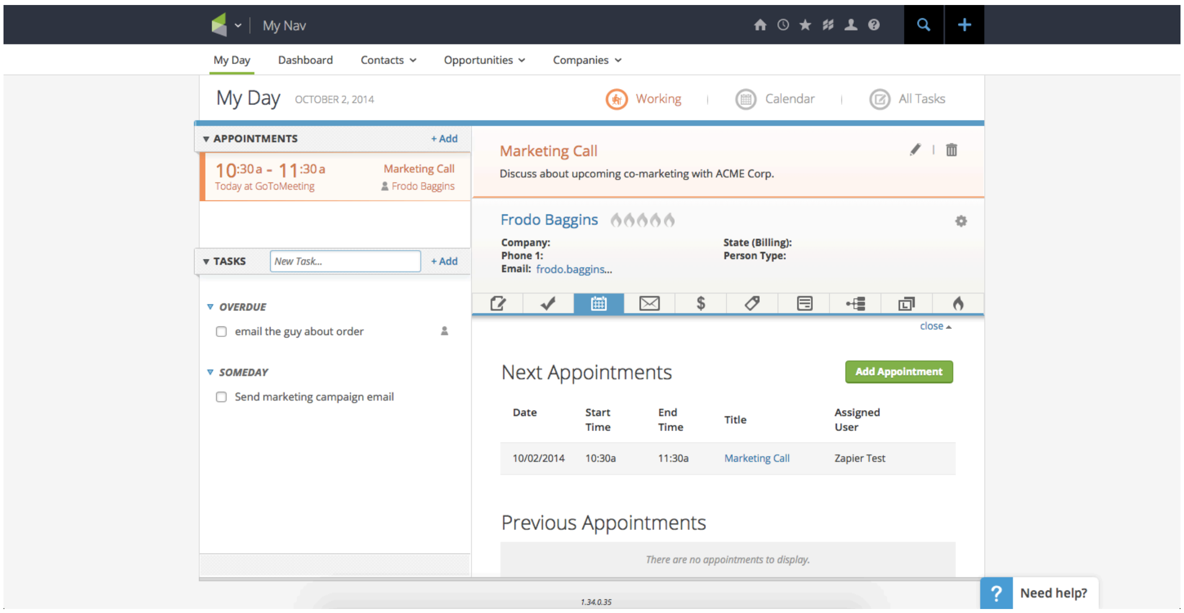
Ever wanted a way to talk to the people visiting your site or using your app, the way you could call up to a specific office using your building's intercom? There there's a new digital intercom for you, aptly named Intercom. It'll find out who's using your site or app (it's the only tool among this bunch that works with mobile apps, too), let you filter through them easily, send them emails or in-app messages, and see who's slipping away. You'll even have a team inbox where you can handle support, marketing or anything else.

Automating your customer discovery can be scary, and a big commitment. If that's how you're feeling, Intercom might be the perfect choice since it lets you try it out for free and still gathers your real customer data. Then, if that gets you itching for more, it's just an upgrade away. Plus, since you can take care of support in the same app, you'll have your CRM, marketing, and support all under one roof, giving you the communication tools you need to actually make a difference with your users.

Price: Free event tracking and customer profiles; around $20 per 1k customers for full features

For a deeper look at features and pricing, see our Intercom review.

Infusionsoft



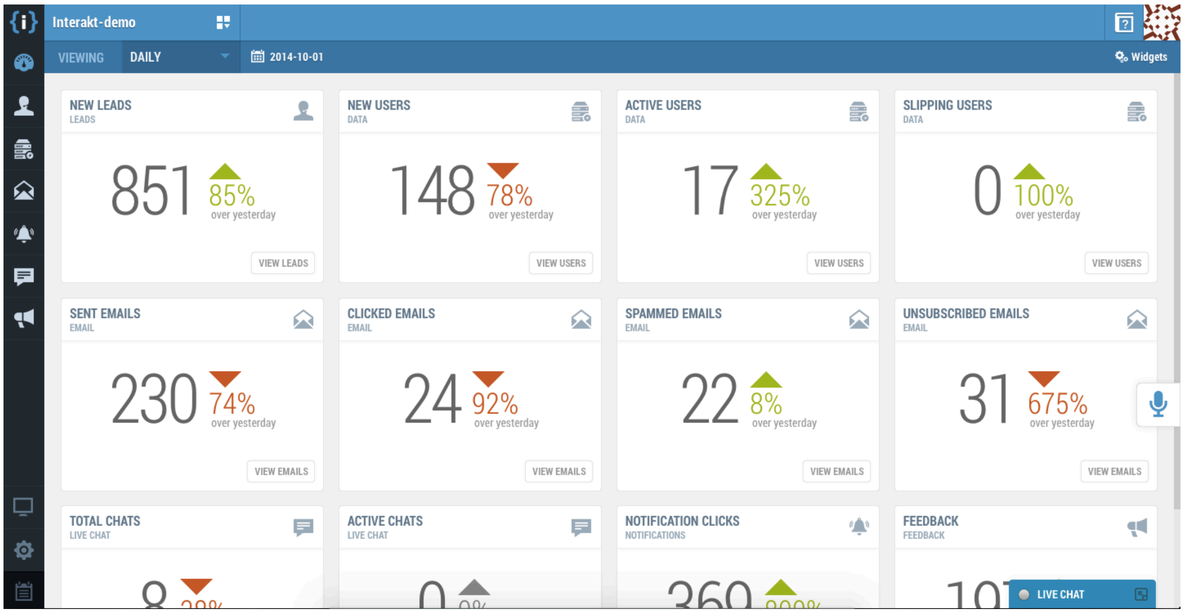
When you start your day at work, you likely open a half-dozen apps and websites and spend quite a bit of time just figuring out what needs done and finding the info to do it. Not anymore with [Infusionsoft](). It's watching your site, tracking info about your potential customers and what they've seen, and at the same time is keeping up with what you need to do. Then, in a nifty "My Day" view, it'll show you everything you need to be doing—including your tasks, communications with contacts, and calendar appointments—along with info about the customers related to your tasks right in the same overview.

There's also the marketing broadcast tools you'd expect to email all of your contacts, but there's also ways to send voice messages, faxes, or even print out paper letters with your contacts' personalized info to send out by mail. And if you're not already selling products directly from your site, you can use Infusionsoft's eCommerce tools to build your own store and track the purchases and pages viewed right in your CRM. It's everything you'd need to identify your customers' needs, customize marketing to them, actually sell your real products, and make sure you're staying on top of everything you need to do at the same time.

Price: Around $75/team member per month

For a deeper look at features and pricing, see our Infusionsoft review.

Interakt



Like data, charts, and visualizations? Then you'll love Interakt. This app puts the numbers front and center, so you'll quickly be able to get a gauge on how many people are visiting your site, contacting your team, and converting into paid customers. You'll quickly see what's going good—and what's not—at a glance.

Then, in a nod to more traditional CRMs, Interakt gives you two separate sets of people: users and leads. Users are the people tracked using your app automatically, and there's the tools you need to filter them down by almost any data point, see who's slipping away from using your site, and who's the most promising new users.

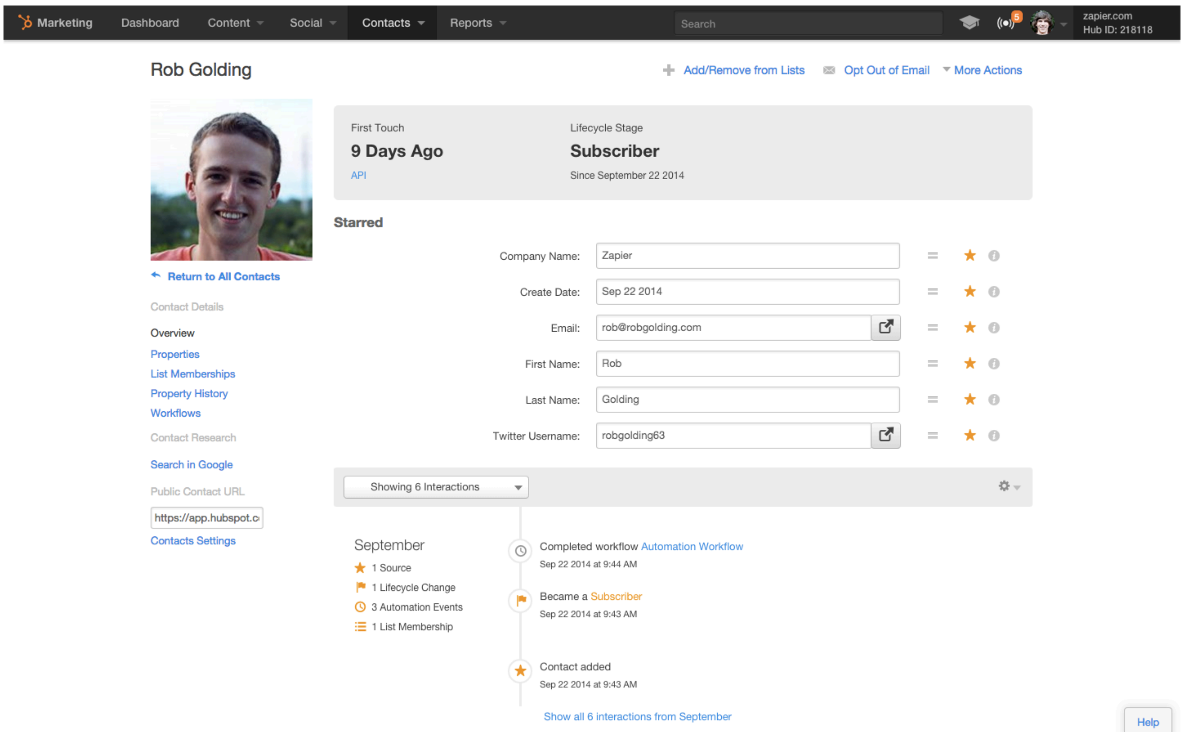
Then, leads are the people that need more hands-on attention: direct contacts you add or import, or people who get in touch via your contact form. It's a nice way to let you focus, say, on both your normal site users and larger clients at the same time.

There's also live chat, an extra that's a nice way to let people reach out to you when they're stuck. You can talk to people on your site directly from Interakt, leading them through your app or helping them see exactly which of your products is best for them. Combine that with in-app messages and email campaigns, and you have everything you need to lead your users through the sales process.

Price: Free for personal use; around $10/team member per month

For a deeper look at features and pricing, see our Interakt review.

HubSpot



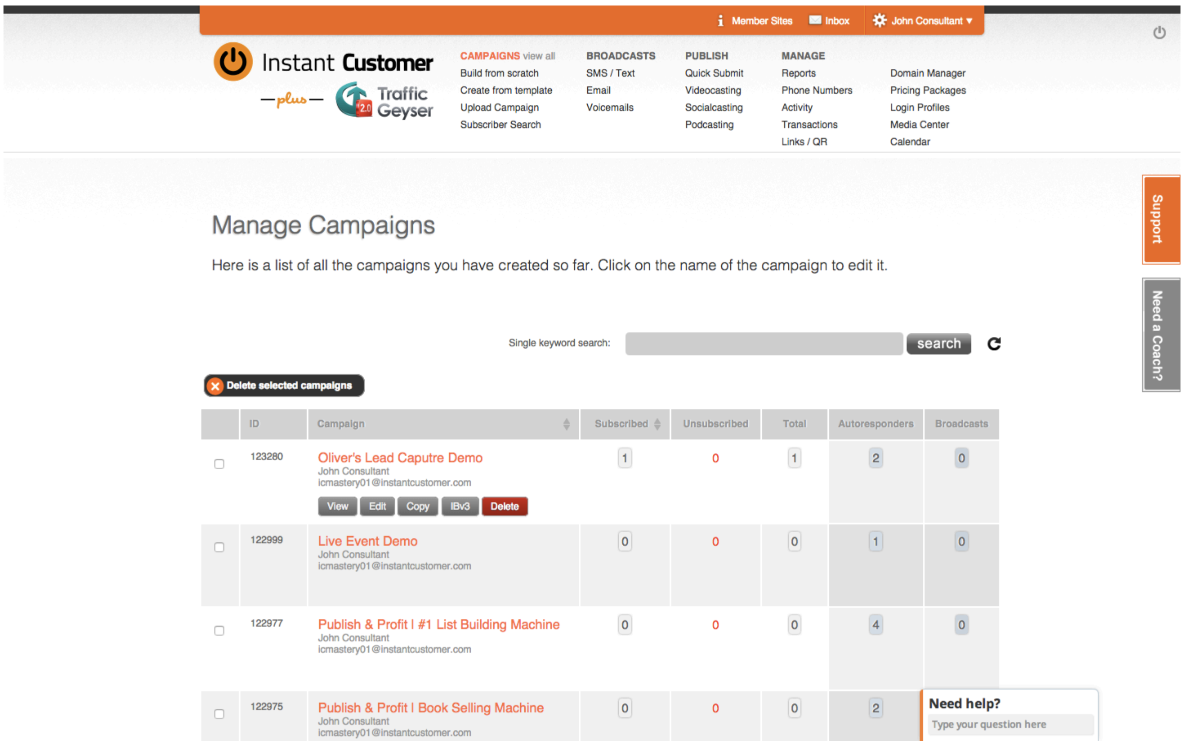
Google Analytics can show you what pages are being looked at in real time, along with detailed info about the browsers used, exit pages clicked, and how long people are on your site. You can even use it to see—to a certain degree, at least—which keywords and content styles perform best. [HubSpot]() gives you that same info, along with the tools you need to create great landing pages, blog posts, and more, plus CRM tools that'll help you identify your customers and continue your marketing efforts.

It's an all-in-one app that combines your content creation and social media sharing tools with the analytics data to help that content perform well. Then, it also has a detailed CRM that shows info about your site visitors, marketing automation tools to reach out to your visitors and turn them into customers, and the new Sidekick tool to give you a combined place to email and contact everyone.

Price: Around $800/month for unlimited team members and up to 1,000 customers; $50/month per additional 1k customers

For a deeper look at features and pricing, see our HubSpot review.

Instant Customer



Your ideal sales lead will click on a Tweet of yours, visit your site and fill out a form indicating their interest, leaving you in the perfect place to follow up and close the sale. Simple. Except, the world isn't simple. Some people might rather call, others would email, and there's even people who might send a text message or hand you a business card. Instant Customer is ready for them all.

It'll capture your customer leads, no matter where they come from, and give you the marketing automation tools to follow up with each of them to close the sale. You can even follow up automatically with the medium they originally used to get in touch, automatically calling back with a recording, sending an SMS, or putting together a customized email depending on their info.

Price: Around $10/team member per month with 2 phone numbers and a point system for call, SMS, and other usage pricing

For a deeper look at features and pricing, see our Instant Customer review.

Jumplead

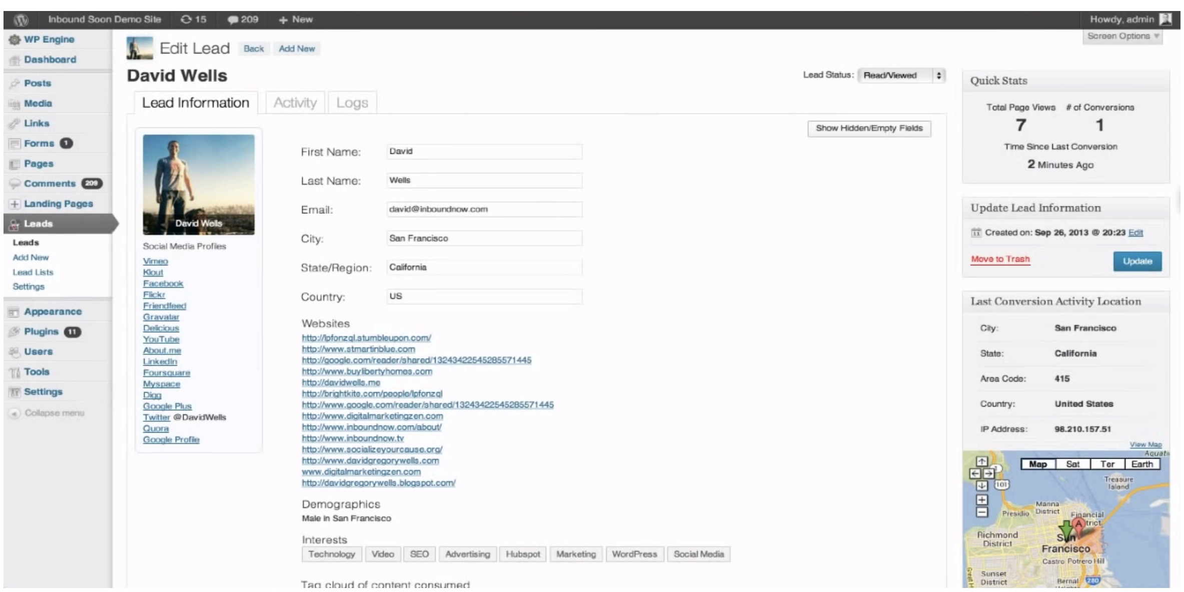
Location matters. Knowing if your potential customer is in India or Indiana—or if they first browsed your blog page or your pricing page—can be crucial in closing a sale. Jumplead gives you that knowledge by putting location front-and-center.

Right on the dashboard, you'll see the locations of your site visitors on a world map, along with the pages on your site that are being viewed. You can automatically categorize potential customers based on any criteria, and then can wait for them to reach out on a live chat or proactively start chatting with them when it seems they might be close to buying. Combine that with the standard CRM and marketing features, and you've got an extra set of tools that just might help you sale faster than you would if you're waiting on drip emails to bring back customers.

Price: Free for 1 user and up to 100 customers; around $16/team member per month for basic plans

For a deeper look at features and pricing, see our [Jumplead review](#).

Inbound Now



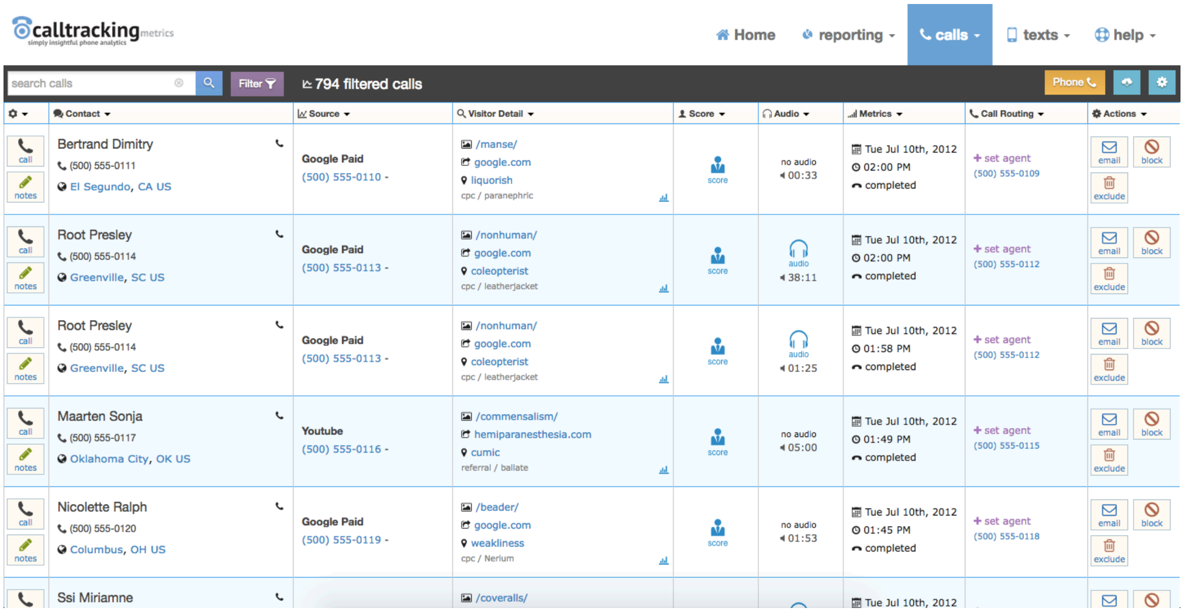
WordPress is one of the most popular content management systems today, and it's a rather easy way to build your site, blog, and even eCommerce store. On its own, WordPress is little more than a tool to build a blog, but its rich ecosystem of plugins and themes let it be almost anything you want. And with Inbound Now, it can be your marketing automation too, too.

Instead of being a separate app with just a code snippet you'll add to your site, Inbound Now lives inside your WordPress install, capturing leads and automating marketing right from the place you manage the rest of your site. It's got free tools to create landing pages, A/B test them, and identify your site visitors, then there's paid extensions that'll add social media and email integration, lead importing, and more.

Price: Free basic features; add extra features starting at $9.99 per plugin or $149.99/year for unlimited plugins and support

For a deeper look at features and pricing, see our Inbound Now review.

CallTrackingMetrics



If you're running a brick-and-mortar business—say, a hotel, restaurant, or store, or even an in-person service company like a law firm or repair team—website visitors might not be your most important lead source. You'll likely have far more people calling your business to check about your opening hours, current prices, and more. [CallTrackingMetrics](https://www.calltrackingmetrics.com/) is designed exactly for that.

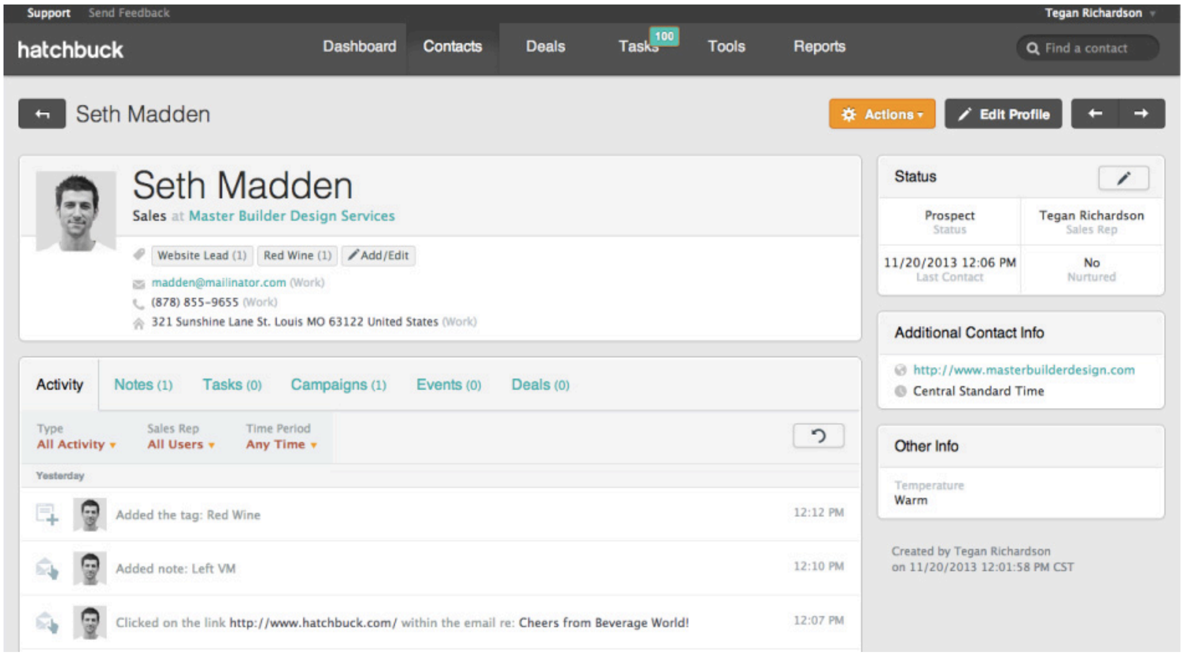
It's far less of a CRM and a marketing automation app than most of the apps on here, but it fills an important niche for businesses with more calls than clicks. You can take your sales calls in the web app, track info about each of the callers, and CallTrackingMetrics will let you know which page or ad the user saw when they called. There's even SMS automation so you can send text messages to potential customers, following up even when there's not an app for them to keep using.

Price: $29/month with unlimited team members; Phone numbers start at $2.25/month, calls at 4.2¢/minute, and SMS at 1.75¢/message

For a deeper look at features and pricing, see our CallTrackingMetrics review.

> **Tip**: Close.io is another CRM that's focused on calls, along with more traditional CRM related features like tracking leads and deals.

Hatchbuck



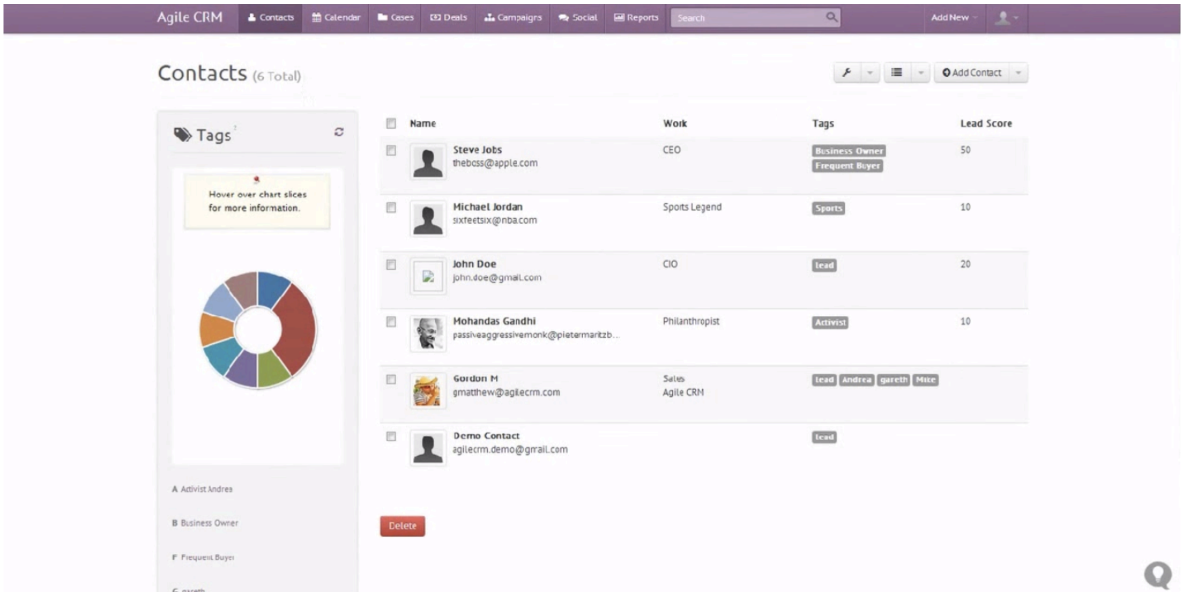
Contact-focused CRMs are one of the best ways to maintain a personal touch with your customers and business contacts, since you'll have one place to keep track of everything about them. Hatchbuck gives you that same contact-focused interface combined with even more detail about each person related to your company. It has a bit more focus on the traditional ways you'd gather leads—especially via forms—than the other apps listed here, and instead of focusing on every possible visitor it's just focused on the important leads you import or that fill out your forms.

Then, though, it keeps an eye on them, seeing which of your personalized and automated emails they read, which links they've clicked, and what they've seen on your site. It'll help you extend your relationships personally with the most important people while still automating the most tedious of marketing tasks and giving you data you couldn't possible uncover otherwise.

Price: Starts at $99/month for 1 team member up to 2.5k customers or $299/month for unlimited team members and customers (Zapier support coming soon)

For a deeper look at features and pricing, see our Hatchbuck review.

Agile CRM



Want a marketing automation CRM that'll keep you on your toes? Then you'll love Agile CRM's real-time notifications based on your contacts' behavior. You can get notifications when they've opened your email, clicked a link, or are just browsing your site. Then, you can make sure they remember you, too, with in-app notifications and even automated SMS drip campaigns.

There's also the deep analytics you'd expect, a full-featured social networking suite to help you stay on top of your mentions and more, and VoIP integration that works with Twilio so you can make and receive calls right from your CRM. There's even eCommerce integration so you can remind people about items they've left in their cart and make sure you get the sale.

Price: From $14.99/team member per month

For a deeper look at features and pricing, see our Agile CRM review.

—

It can be very difficult to decide which marketing automation app is right for your team, especially since one app will handle so much of your team's marketing workflow. Hopefully you've found a couple of apps that seem especially interesting after reading through this chapter—perhaps along with some of the traditional CRMs covered in chapter 2.

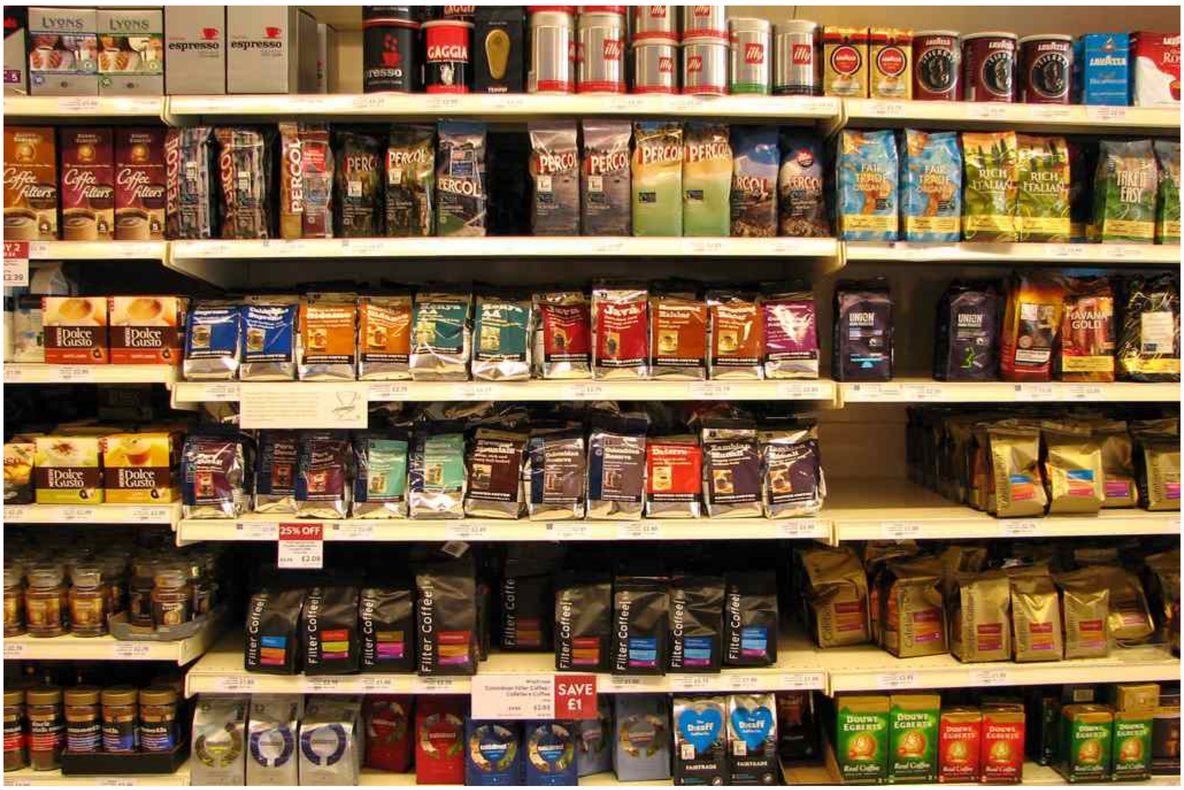
Feel free to experiment; you can try out the trial edition of each of the CRMs that seem most interesting, see which work well for your needs, and then stick with the best.

Next

Or, just keep reading. In the next chapter, we'll hear from a number of teams about how they picked their CRM, what they like about it, and how they've integrated it into their workflows.

Photo of gears via Stefan W.

Chapter 4: The Value of CRMs: Case Studies



How to Pick the Best CRM, Put it to Work and Automate Your Data Entry

Do you know that feeling when you're standing in the aisle at the store, trying to decide which bottle of olive oil or bag of coffee beans to buy? There are so many options, with quite a few good choices. They'd each get the job done. Maybe one would taste a bit better, but it's late and you need to get home, so you just grab one and go on.

Picking out an app can be similar. There are so many similar apps for any one task, it can be almost impossible to pick between them. At least with an email or notes app, you can easily switch to another with little trouble. Pick one and move on. But when you're picking something as crucial to your business as a CRM (customer relationship management) app, you want to *know* you're getting the best one for the job.

You've learned why you'd want to use a CRM in our chapter 1, then looked at some of the best traditional CRMs and marketing automation CRMs in the next two chapters. Those chapters showed you the best of each CRMs and a glimpse of how they work. And yet, you'll still likely find it tough to pick just *one* great CRM when there are so many good ones.

So we asked around, to see which CRMs various entrepreneurs, established companies, freelancers and more use for their work, and why they picked them. Here are some of the best reasons why you should pick any of the CRMs we've covered, and some great ideas for how they can help your team get more done in less time.

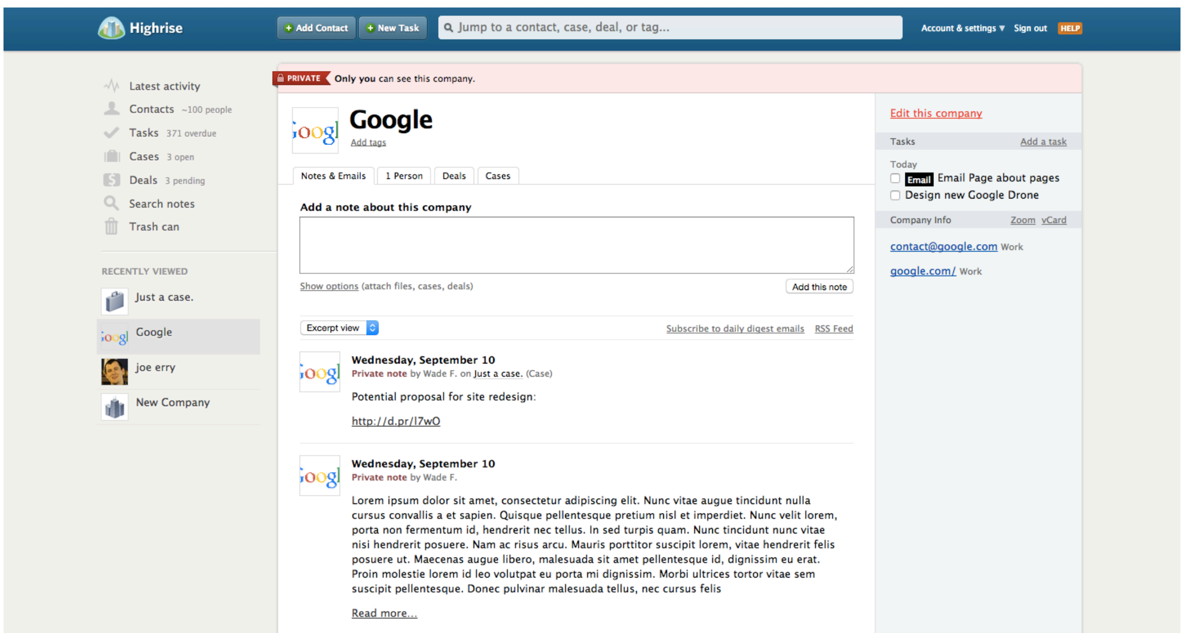
Picking the Best

> "While window shopping can be fun, at some point you have to commit to a system to use."
>
> - Gray MacKenzie, GuavaBox Co-Founder

Perhaps it's best to state the obvious from the beginning: there is not one *best CRM*. Each one has its advantages and unique features. Of the 35 apps we've reviewed so far in our CRM series, no two are exactly the same. There are similarities, sure, but each one has its own ways to manage contacts, unique interface, integrations, and more—you're bound to find one that fits your needs better than another.

Here are some ways that various teams picked their CRMs, and why they've worked well for them.

Go for Something Simple and Cheap



Picking a CRM can be overwhelming, but using your CRM shouldn't be. There are several simple CRMs that can help you get much of the benefits of a CRM without the confusion of custom deal flows and more, and cheap options that won't overwhelm your budget as well. That's why the TruPar team picked Highrise.

"It was cheap and easy to get started. I didn't want or need something so complex, or as expensive as Salesforce," says Sean McDonnell, the company's co-founder.

Price and simplicity also played a part in why Brittany Berger, a content marketer, picked Insightly.

"I don't work in sales or frequently deal directly with customers," says Berger. "I use the free version of Insightly to manage relationships with journalists, influencers, guest bloggers, etc. [It] just makes it easy to keep track of relationships."

Self-hosted CRMs—apps which you can download and run on your company's own servers—can also be very cost effective if your budget is the most important criteria. They won't be free, but since you're only paying for the server to host them on and perhaps some IT time to set them up and customize them for your team, they will often work out quite economically over time. That's why Kartik Isvarmurti, CEO of VMB BPO, choose the free SugarCRM Community Edition.

“I pay only $35 per month for web hosting and I have around 15 users on the CRM,” says Isvarmurti. “On any other CRM I would be paying at least $150 per month for 15 users.”

Customize All the Things

Of course, simple CRMs have their limits too, and sometimes the best option is to get something that's incredibly flexible so you can tweak it and make it work exactly the way you want. Customizability is one of the first characteristics people mentioned when asked why they picked their CRM.

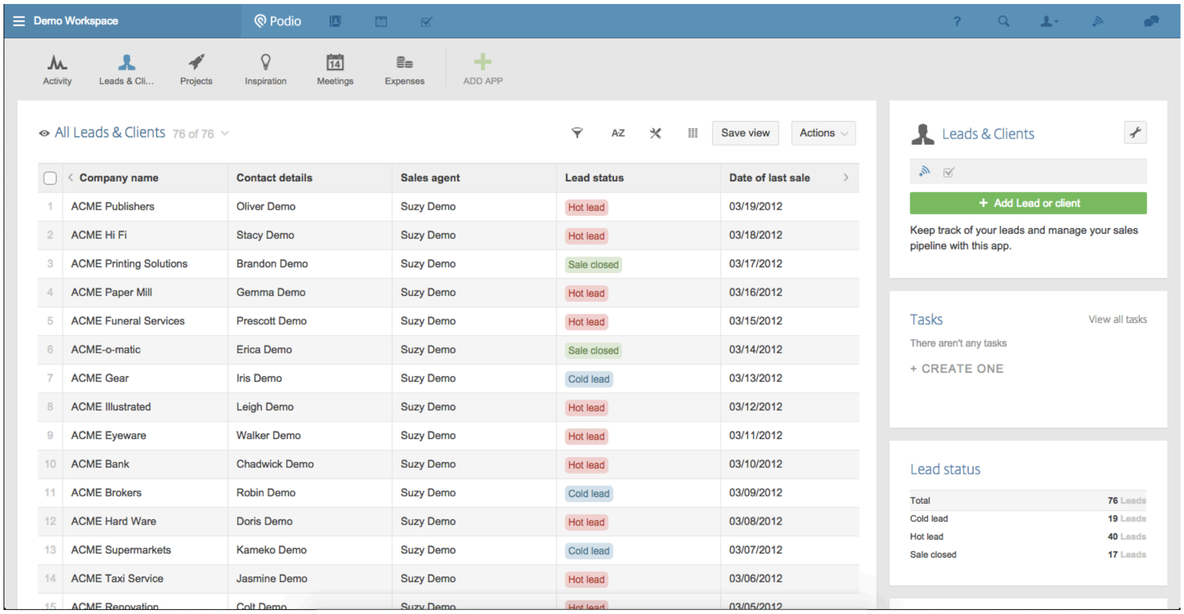
The most well-known CRM of all, Salesforce, has a reputation for being highly customizable. So while its interface may not be as sleek as some CRM apps, you can tweak almost everything—from custom fields to database views—making it into the app you want. And it works with almost everything.

“[Salesforce]’s flexibility to integrate with our own internal data sources as well as third party applications made for a very robust and powerful CRM system," says Jeremy von Halle, director of business operations at BellyCard.

But Salesforce is far from the only customizable CRM. Contactually's one of the simpler CRMs, and yet its customizability is why Zapier user Seth Fischer picked it for his work.

"[Contactually] allowed me to setup system to remind me to reach out to customers based on buckets/classifications," says Fischer. And Podio, the multipurpose app that includes hundreds of tools—including a CRM—to keep your business working, is also loved for the many ways you can customize it.

"Podio is highly customizable, [and] integrates beautifully with Zapier," says Jesus Villalobos, another Zapier user. "Definitely an underdog in the CRM world."



Self-hosted CRMs are especially great in the customizability department. That's why the Price Markets team chose SugarCRM Community Edition for part of their work.

"SugarCRM was a straightforward and extremely customizable CRM that we could develop further according to our needs in-house as we host it ourselves," says A.B. Talei, Price Markets' head of business development. But then, even hosted CRMs with public APIs can be quite flexible if you're willing to put in the development time. That's what Nick Persico, former vice president of operations at Krossover and now co-founder of Smart Host, found with Close.io.

"It’s really easy for any engineer to use Close.io’s API to update lead statuses, add customer engagement data, and create visual dashboards," says Persico.

If you want to dig a bit deeper, you can build even more custom solutions using Zapier, an app automation tool. The DeedGrabber team used Infusionsoft's HTTP Post function to let that CRM do anything they want.

"Basically, any time an event happens (someone buys something, clicks an email, remains in a funnel for a certain time, pretty much anything you can conceive of) you can send an http post to another server that contains all the prospects' or customer's information in it, says Rick Dawson of DeedGrabber. "This integrates perfectly with webhooks in Zapier, so you can basically do anything with that information in another app that Zapier services, which is about anything you'd ever use."

Put Everything Under One Roof

Another good strategy in finding a CRM is finding one that'll work with the tools your team needs most. The Steam Train Creative team, for example, needs to use phones in their marketing, so they picked Agile CRM since it integrates with their RingCentral-powered phone system. Social media marketing is more important for the Convert team, on the other hand, so Nimble turned out to be the best CRM for their needs.

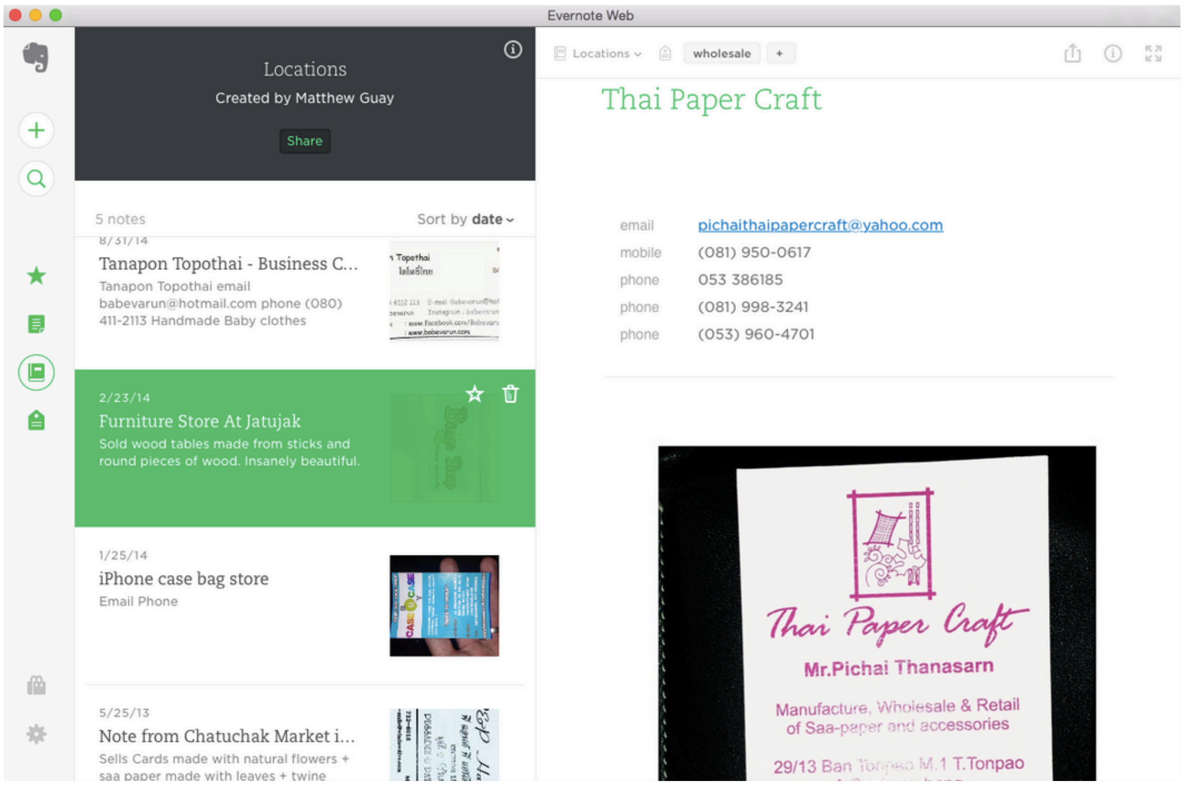
Then, on the other hand, you might want one app that brings everything together under one roof. That's what the multipurpose and marketing automation CRMs do best: they let you automate your email campaigns, manage invoices, and more all from the same app. It's this type of integration that led DeedGrabber to choose Infusionsoft. "[Infusionsoft is] a good solution overall because it incorporates your CRM, your email sending, your shopping cart, and pretty much all interaction with your customer, in one place where all the information is interconnected," says DeedGrabber's Rick Dawson. GuavaBox, on the other hand, needed great voice support, and thus choose Base. "With Base Voice, you can make and record calls directly from inside the app," says GuavaBox co-founder Gray MacKenzie. "This is amazing for situations where you have multiple team members working with a prospect or client, as well as long sales cycles where you might not remember what you said three months ago."

Get Something You're Used To

Or perhaps, you could pick something that fits into the apps that you're already using. That's what's great about Streak: it's a full CRM right inside of Gmail, so you don't even have to start using another app. You just keep using Gmail, now with the addition of a CRM. That's why Paul Griswold picked Streak. "I hate to have to switch between things, so having it living inside of our corporate Gmail was perfect," said Paul.

The next best thing can be a CRM that looks and works much like apps your team's already used to. The SPI team picked Insightly for that very reason. "The interface feels and interacts like a Google product so everything is very familiar," says SPI co-founder Jeremy Goodwin. That's also an advantage to kanban-style CRMs like Pipedrive, now that kanban project management has been popularized by apps like Trello. "Pipedrive is to CRM what Trello is to project management: A kanban based system that provides a visual backdrop for your sales system," says Lawrence Watkins, founder of Great Black Speakers.

Do More With What You Have



But then, you just might not need a full, advanced CRM, and another way to simplify stuff is just to use an app you already are using. As mentioned in chapter 2, even Google Contacts—the address book built into Gmail—can be a CRM of sorts, complete with notes about your contacts and quick ways to surface all of your conversations with them.

Even Evernote, the versatile notebook app, can fill the space a CRM would otherwise occupy. As Renee Shupe—a Zapier user who employs Evernote this way—says, "It works for me as I find most CRMs are weighted with too much stuff.” Trello, the popular Kanban productivity app, is another great app that can be used as a quasi-CRM. The Thoughtbot team used it as a visual sales pipeline, since they're already using it for managing projects and more.

Depending on your needs, you just might find repurposing one of your existing apps as a basic CRM is also the best strategy for you. With Zapier to help you automate data collection and more, you might even find that your quasi-CRM is just as powerful as a "real" CRM.

Putting Your CRM to Work

> “The biggest barrier that we have is the same one that every company has: actually getting people to use the CRM.”

- Brad McCarty, FullContact Content Director

No matter which CRM you choose, the important thing is that you and your team actually *use* it. Picking a CRM may seem difficult, but getting all of your data into the CRM, making sure your team knows how to use it, and then learning to rely on it for all of your contact needs can be far more challenging.

Here are some great ways to make sure you get the most out of any CRM, from the teams who have CRMs that they love.

Fill a Need With Your CRM

You can pick out the shiniest CRM, customize it to work just the way your team works, and give everyone a day just to learn how to use the CRM, and you might later end up finding that the CRM never *really* gets used. After all, you could have the nicest hammer in the world, but you'd never use it if you didn't think you needed to use it in your work.

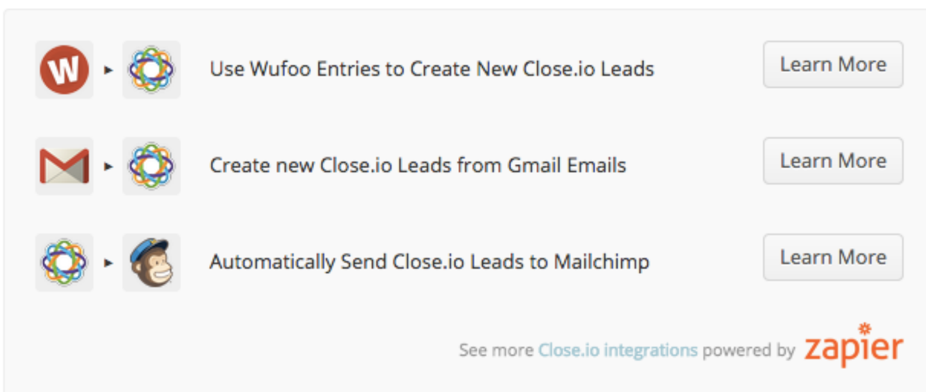
"The biggest barrier that we have is the same one that every company has actually getting people to use the CRM," says Brad McCarty, the content director at FullContact. "There are so many good ones, but every one of them is useless unless it becomes an active repository of information." And no one is going to be very motivated to take on the extra work of adding info to a CRM if they don't see how it benefits them.

That's why, first off, you could make sure your CRM actually fits a need your team has. Don't get a CRM just to have one; get one to fix a problem you have or to do something that you've struggled to do in the past. That's why when the Sendhub team needed an easier way to know what'd been said to customers, they picked RelateIQ.

"RelateIQ makes it easy for us to have insight into what is going on with a new lead or current customer, so nobody on our team is out of the loop and can pickup where the last person left off," says Sendhub sales team member X'Zavierr Garland. RelateIQ filled a need, making it a perfect CRM for them.

Automate Everything

Once you're sure it fills a need you have, make sure it is easy for your team to use by automating everything as much as possible. As Parker Conrad, CEO and founder of Zenefits says, "If a CRM requires you to enter data, you just won't use it." So use your CRM's built-in integrations with your website, forms, email, contacts apps, and more to automatically gather your contact info and more. The Krossover team does this so well with Close.io, they never have to enter anything into their CRM.



Zaps:

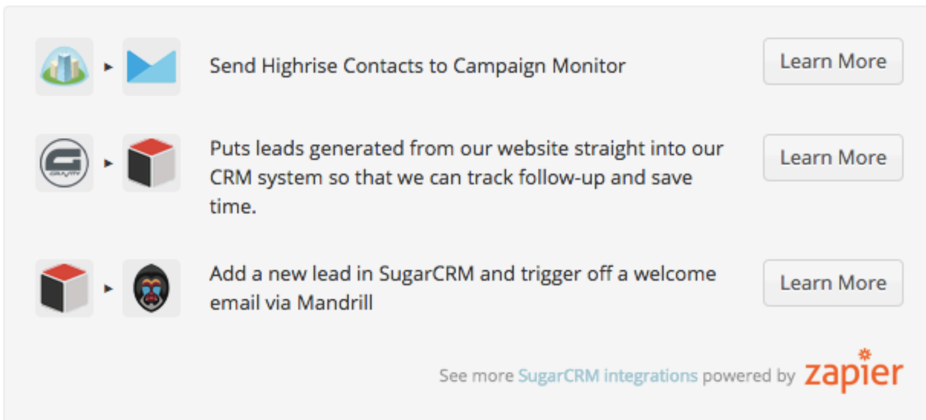
- Use Wufoo Entries to Create New Close.io Leads
- Create new Close.io Leads from Gmail Emails
- Automatically Send Close.io Leads to Mailchimp

"Every action we take on a lead or opportunity is tracked automatically, so there’s no data entry!" Says Persico.

Then, you can get even more data automatically added to your CRM with Zapier. Any app that works with Zapier—your notes apps, social networks, forms and more—can automatically be sending data to your CRM. It just might be the different between your CRM working for your team or not. As TruPar's McDonnell says, "Zapier allowed us to automate a ton of stuff, so much so that I probably wouldn't have actually used Highrise without it due to my limited bandwidth and the time cost of manual data entry."

The same is true for the BillCutterz team; when their app was featured on ABC and they received over 10,000 sign-ups in a day, Zapier was the only thing that made it possible to keep their CRM up-to-date.

"There's no way that I could have put all those people in Sugar [CRM] by myself," says Sydney Alcala, vice president of BillCutterz.



Zaps:

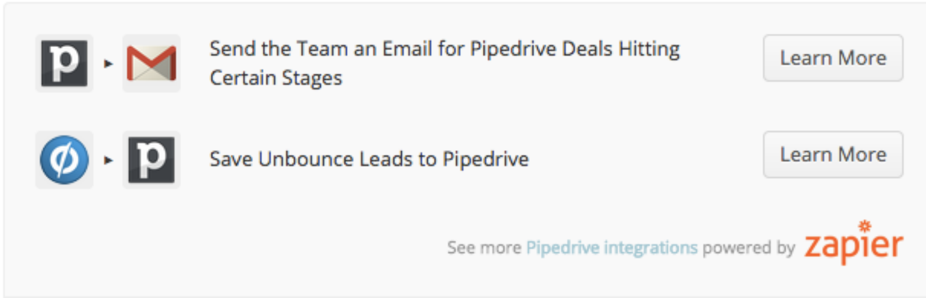
- Send Highrise Contacts to Campaign Monitor
- Generate SugarCRM leads from Gravity Forms entries
- Add a new lead in SugarCRM and trigger off a welcome email via Mandrill

Data entry isn't the only thing you'll want to automate with your CRM.

"One mistake that many businesses make when creating an automated workflow is that they forget to 'close the loop' with feedback that confirms an action was completed," says Tom Iannone, senior integration manager at Trekksoft. That's why marketing automation CRMs like Pipedrive let you make workflows that'll automatically send followup messages to your customers at the times that make the most sense for your business.

That's what both Trekksoft and Lawrence Watkins, founder of Great Black Speakers, use to get more done and stay in touch with customers.

"At every stage in our pipeline, we have if/then statements set up to do things automatically," says Lawrence. It helps them get more done without any extra work—something that'll be sure everyone on your team loves your CRM.



Zaps:

- [Send me an Email when Pipedrive Deals Hit Certain Stages]()
- [Save Unbounce Leads to Pipedrive]()

Tweak Your CRM

You don't have to have a self-hosted or hand-coded CRM to get it to work the way you want. Almost every CRM will let you add your own tags and custom fields, and you can use them to make workflows work just about any way you want. And if you have a more advanced CRM, you can make custom views, workflows, and more to get your CRM to work the way your team is used to working.

"Custom fields are one of the most important factors when creating a successful workflow," says Treksoft's Iannone. "Other than hiring a developer, this is the best way to build a solution that is custom -fit to your business model." You can use them to track a variety of things, such as geolocation—as the Trekksoft team relies on to keep track of their customers' time zones and more—or special fields designed just to trigger Zapier and start actions in other apps.

Just make sure you don't customize so much that everything becomes overwhelming. Eric Levitt, co-founder of YOLO Publishing, says with his team's use of Infusionsoft that “[it's] a very moldable platform but needs to be kept clean." That's why his team has worked hard to find the workflow that'll work for them. "The biggest challenge we have had over the years is the initial setups of products and workflow," he says.

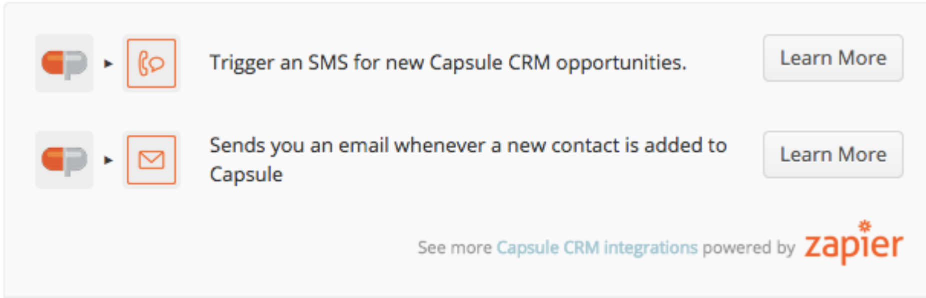
So customize, but don't overdo it. Think through the processes that your team already has in place, and the pieces of data that you already need to collect, and make sure to implement them into your CRM. If you plan ahead and customize right from the start, you'll have a far better chance of making your CRM a tool that fits your team's needs perfectly.

Listen to Your CRM

CRMs don't have artificial intelligence—not yet, anyhow—but they can be smart enough to let you know what you need to be doing. So listen to it. It's easy to be overwhelmed by notifications these days, so your first inclination might be to turn off the notifications whenever you install new apps. But you won't want to do that with your CRM.

Instead, tweak your notification settings to let your CRM send you the most important stuff, the things you otherwise might miss. That's why the Savoury Chef team has given CapsuleCRM permission to bug them.

"If a case is of high importance, it's synced so that it notifies a manager by SMS and email that they need to take action immediately," says the company's co-founder, Kyle Nordman. "With Zapier's filter function, we can assign followup inquiries to specific team members based on keywords, or inputs from our form submission, or lead generation systems. It keeps us very quick and on top of things."



Zaps:

- Trigger an SMS for new Capsule CRM opportunities
- Send an email whenever a new contact is added to Capsule

Depending on your CRM, you'll find different things it can notify you about.

"One of the best features [in PipeDrive] is "the 'deal rotting' feature which notifies users when a deal is stalling," says Trekksoft's Iannone. Or, you might find ingenious uses of existing features if your CRM doesn't have the notifications you want. The Bizzabo team uses Base's tasks as an easy way to notify people in their team about what they need to do.

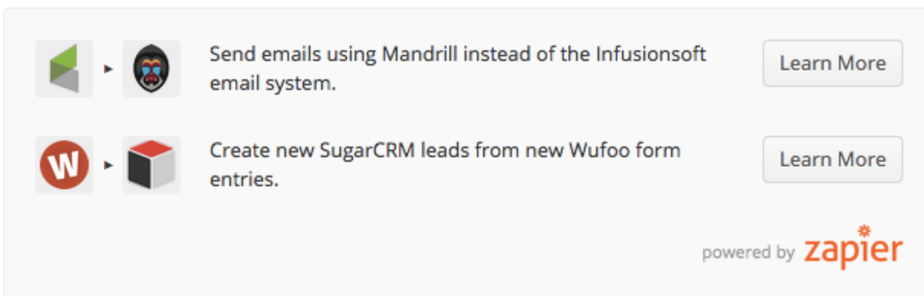
"The tasks are easily created and dismissed and provide a quick way to notify each other that a contact or lead needs attention," says Alon Alroy, Bizzabo co-founder.

Or, you can use Zapier to make the notifications you want. You can integrate Zapier with your CRM to send you an SMS when a new contact is added, a push notification when a lead's status changes, or a celebratory message in your Slack or HipChat room when a deal is closed. With data automatically flowing into your CRM and it automatically notifying you when stuff happens, you might find that you're using your CRM without ever having to actually open it.

Use the Best Apps for the Task

Your CRM is great—it should be if it's the one you've decided to use—but that doesn't mean you'll love everything about it. You might wish it had more options to customize the emails it sends, or that it had better forms for capturing leads. That's OK, since you don't have to *only* use your CRM's built-in features.

Instead, you can pick your favorite apps for each task, use them instead of your CRM's built-in features, and then use Zapier to keep everything in sync. For example, Dawson of DeedGrabber wanted more email features than Infusionsoft offered, so he used Zapier to integrate with Mandrill, a transactional email app, and send emails based on CRM actions. The VMB BPO team had a similar problem when SugarCRM's forms weren't as robust as they wanted, so they use Wufoo for their forms and use Zapier to integrate them with SugarCRM.



Zaps:

- Send emails using Mandrill instead of the Infusionsoft email system
- Create new SugarCRM leads from new Wufoo form entries

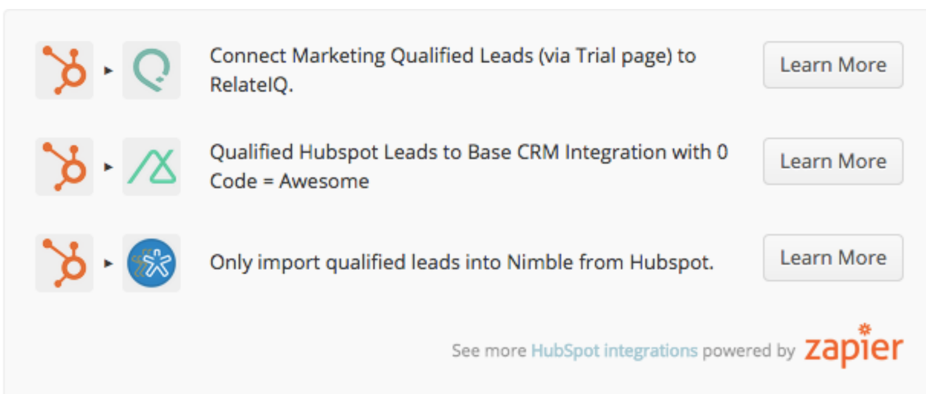
Use More than One CRM

Sometimes there may not be *one* best CRM for all of your team. A more traditional lead-and-deals CRM might be better for your sales team, while a contact or conversations-focused CRM could be better for your marketing team. Or maybe you'll find that you need two different similar CRMs just because of their various features. That's fine, too.

The Price Markets team ended up using both SugarCRM and Pipedrive for their global and institutional teams, respectively.

"[With] global teams working independently, we really needed a CRM that can have numerous roles with customizable rights turned on and off," says Price Markets' Talei. "As we are FCA regulated, it's important for us how we protect client data and that we only expose client data where needed to those authorized to view it." But then, he went on to say, "we use Pipedrive for our larger ticket business such as our Institutional Sales, [so] we can use our Google email separately from the CRM but still connect data between [the] CRM and email, and at the same time work together in team on specific deals."

They're far from the only company using multiple CRMs to get more done. The Brandfolder teamhacked together the perfect CRM for them by using Intercom to generate leads and UserVoice to keep up with customer conversations, and then tied them into Pipedrive with Zapier. Then, the Glider team wanted a sales leads CRM, so they picked HubSpot, but then also use RelateIQ to keep up with conversations and tie the two together with Zapier. And GuavaBox uses HubSpot, Base, and Nimble—the first to gather leads automatically, the latter two to manage different types of leads.



Zaps:

- Connect Hubspot landing page leads to RelateIQ

- Send qualified Hubspot leads to Base CRM
- Import qualified leads from Hubspot into Nimble

If you're having trouble picking just one, you're in good company. Just make sure you get each of the CRMs you pick to work together with Zapier so you can use the best one for its best features, and still trust that all of your info will be there when you need it.

Stay Up-to-Date

The CRM you choose doesn't have to just work great today. It also needs to grow with your team and work with the services and devices you'll need to use in the future.

"It is important to pick a CRM that is consistently working to improve their products," says Great Black Speakers' Watkins. It's bad if you pick a CRM and your team doesn't use it, but it's far worse if you put the time into getting a CRM to work for your team and then find that it breaks or shuts down soon after.

That's why you should be sure to look at the blogs and social media accounts of the CRM you pick before you decide to use it. Make sure it's in active development, with a team that's still working to improve it and add new features over time. If you can see how it's improved over time, you'll feel far better about trusting it with your future. That's why MacKenzie's team at GuavaBox feels good with using Base.

While window shopping can be fun, at some point you have to commit to a system to use. Base doesn't have every single feature I'd like to see, but it gets the job done and it continues to improve over time," MacKenzie says.

—

With everything from advanced CRMs like Salesforce to multipurpose apps like Podio, from the simplicity of Google Contacts to the advanced marketing automation of Infusionsoft, there are CRMs for everything. No matter which you choose, you can make the CRM of your choice be *your* CRM the way these and others have.

Just dive in, start using it the way that works best for you, and learn to rely on it as the one place for your contact interactions. Automate away the tediousness with your CRM's built-in tools, and tie it in with all of your other apps with Zapier. You'll quickly find that your CRM is an extension of your brain, the one place your team checks for info, and almost like a new team member you didn't even know you needed before.

Next

Now that you've picked out the perfect CRM and found ways to get it to work for your team, it's time to start automating your CRM. In the next chapter, you'll learn how to automatically add contacts to your CRM and let your CRM work for you, and more.

Coffee aisle photo courtesy Lamentables on Flickr.

Chapter 5: Automating Your CRM

The Ultimate Guide to CRM Automation

You don't want to spend your day managing a CRM. You just want a better way to keep up with your contacts, see your team's correspondence with leads, know where your deals stand, and ultimately push your business forward. You'd really rather do your *real work* and not have to worry about a CRM (customer relationship management) tool. But then, real work requires real people, and so a CRM it is.

You've learned the value of a CRM, identified the best CRM for your team (perhaps a CRM that even automates your marketing), and found out how other teams use a CRM. Now, it's time to put your CRM to work for you.

Before doing so, however, you'll first want to know your way around your CRM and have it set up with the fields, lists, tags and more that'll work for your team. Once you've done that, your CRM will likely begin to automate some of your more common manual tasks, such as aggregate your contacts' social network links or add form submissions to your lead list. And then, Zapier is there to help you automate everything else, adding more features and custom tools to your CRM that'll work just the way you want.

Never Manually Add a Contact Again

Your CRM is nothing without contacts; that's the very reason it exists. Getting the first batch of contacts added shouldn't be too hard. All you'll do is import your existing contacts list or perhaps a spreadsheet of contact info you've been using instead of a CRM. Or, you'll just bring in those most important contacts that you've been working with most lately. That's the easy part.

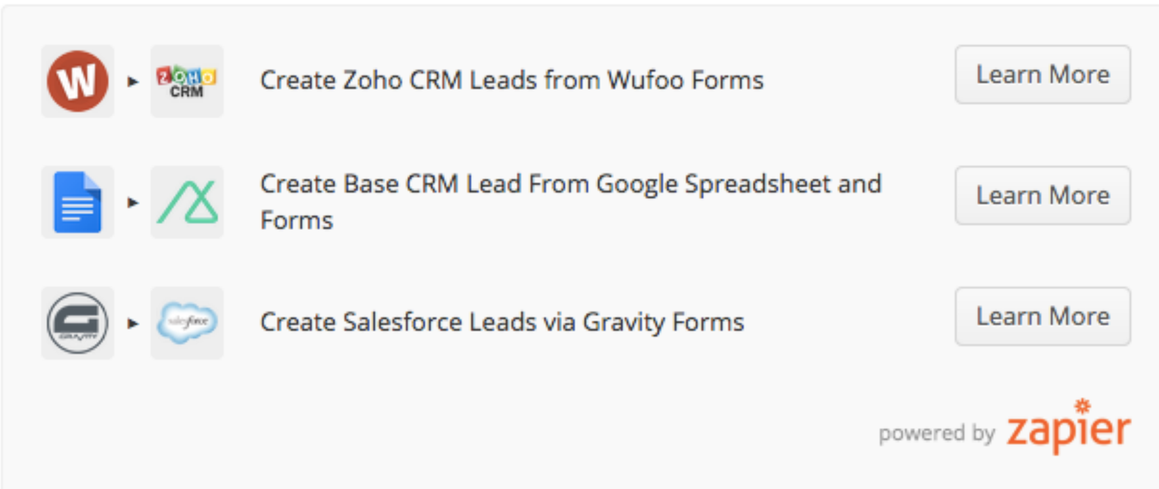
The hard part is keeping your CRM up-to-date. You'll get new contacts you want to add, but no one wants to have to manually enter each new contact into a CRM. Even if your CRM has some ways to automatically add contacts, odds are you'll get new contacts from many other sources.

That's why one of the most obvious ways to automate your CRM is by getting all of your contacts automatically imported, whether that's from a new form submission, email in your inbox or collected business card at a conference.

Forms

Odds are, you have a form on your site where people can sign up for your mailing list or get news from your team or grab a free trial of your product. Perhaps you’re running a survey of your customers or promoting a landing page where people can request info about an upcoming offer.

That's the perfect place to capture leads and send them to your CRM. Even if your CRM has a built-in form tool, often you'll find more features in a dedicated form app, and with Zapier you can get that data sent directly to your CRM.



Zaps:

- Create Zoho CRM Leads from Wufoo Forms
- Create Base CRM Lead From Google Spreadsheet and Forms
- Create Salesforce Leads via Gravity Forms

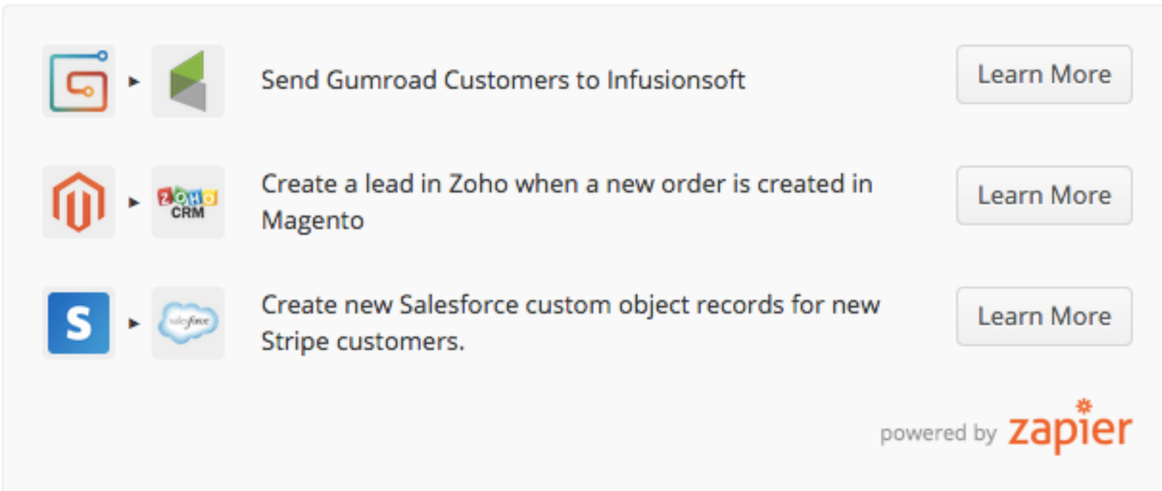
Tip: There are a over a dozen form builders that work with Zapier, so if you don't have a favorite one, be sure to read, "**The 14 Best Online Form Builders for Every Task**".

Purchases

For many businesses, a sale is your only interaction with a customer. Instead of letting that be an ad hoc interaction, why not add them to your CRM so you can easily follow up and potentially turn them into repeat customers?

That's incredibly easy with purchase data, which could contain your customer's name, email, and potentially mailing address and phone number. Based on what they bought, you know why they're interested in your business, too. Funnel all that info into your CRM, and when the appropriate time comes, you'll be ready to target past customers with a marketing campaign.

Zapier supports a number of payment systems like PayPal, Stripe and Dwolla, along with eCommerce tools such as Shopify, Gumroad, Bigcommerce, Magento and WooCommerce. If your eCommerce system isn't supported, you may still be able to use PayPal to get data if the payments go through PayPal, or otherwise you can use the [Zapier Email Parser](#) to find info from purchase emails.



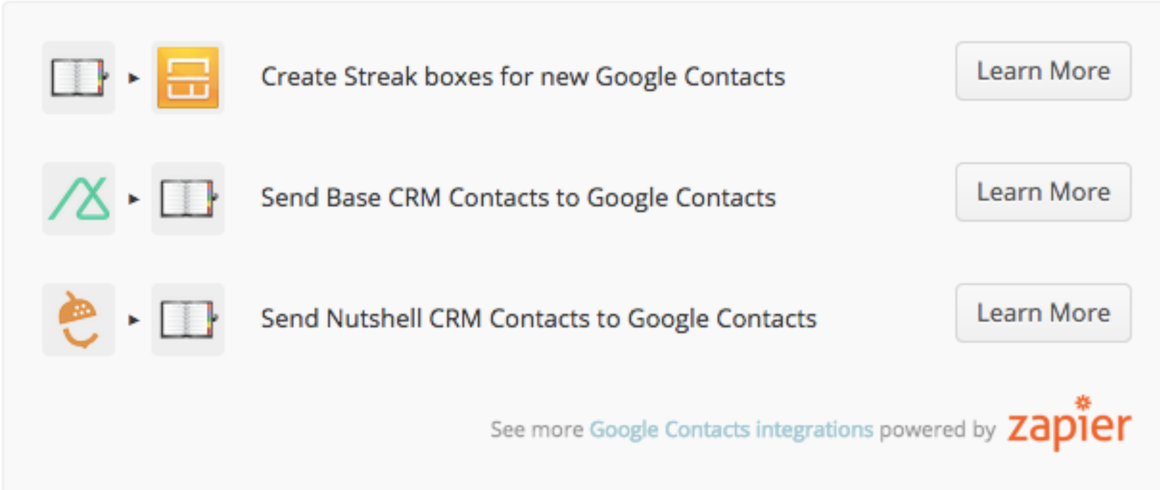
Zaps:

- Send Gumroad Customers to Infusionsoft
- Create a lead in Zoho when a new order is created in Magento
- Create new Salesforce custom object records for new Stripe customers

Address Book

When you first started using your CRM, you likely imported your address book to add contacts. But then, if it only supports one-time import, you'll need to add new contacts to both your address book *and* your CRM going forward. That's a lot of trouble.

If you get an email on your phone from a potential new lead, the simplest way to save their info is to add them to your address book, while it might be easier to add them to your CRM when you're at your desk than to put them in your address book. If your phone's address book syncs with Google Contacts, then Zapier can copy them from Google Contacts and save them to your CRM. That'll save you one step when you get back to your desk, and let you always save contacts to your CRM the way that's easiest for you.



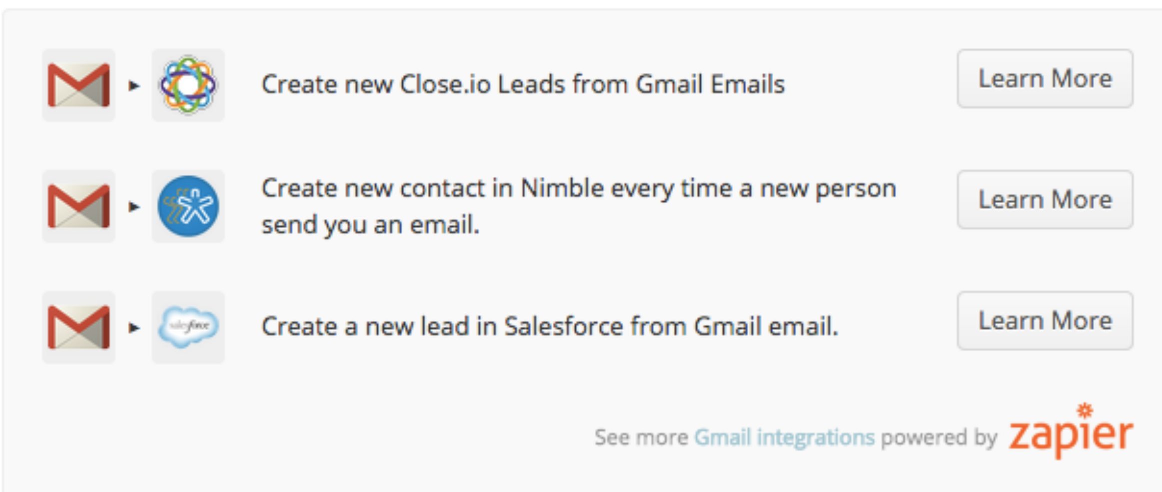
Zaps:

- Create Streak boxes for new Google Contacts
- Send Base CRM Contacts to Google Contacts
- Send Nutshell CRM Contacts to Google Contacts

Emails

Or, better yet, you could have Zapier watch your inbox for emails from new contacts, filter them based on criteria you want, and have the contact info automatically added to your CRM. That's a great way to integrate with forms or other apps that don't already support Zapier, as well.

You can even watch for just emails from specific companies, or skip over all emails that are from Gmail.com and other standard domains. Or, if you use an email alias for your contact email on your site, you can have Zapier import contact info from everyone who contacts you that way.



Zaps:

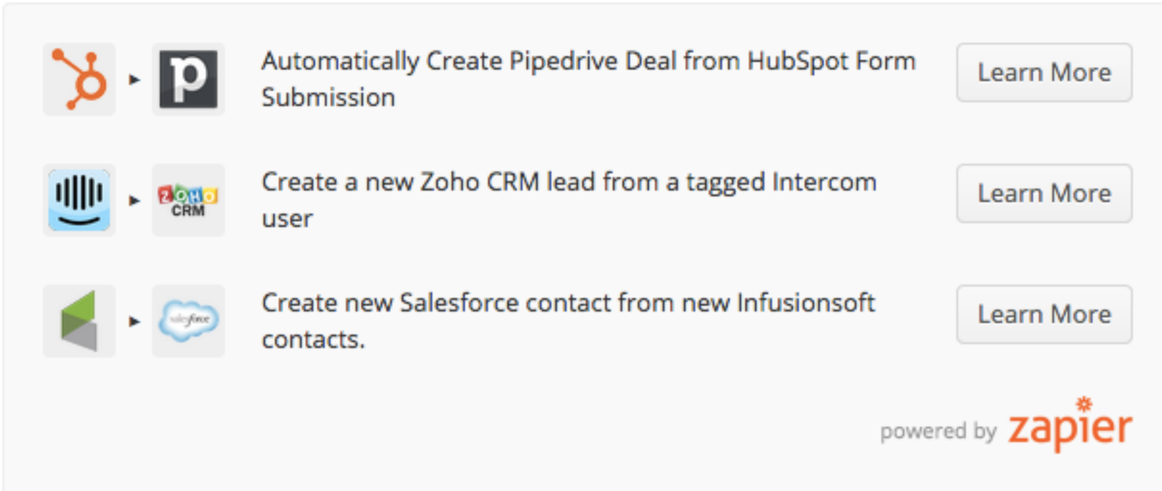
- [Create new Close.io Leads from Gmail Emails]

- Create new contact in Nimble every time a new person send you an email
- Create a new lead in Salesforce from Gmail email

Another CRM

It might not just be your inbox and address book that have leads. If you're like many of the teams we've talked to, you might have multiple CRMs, each one perfect for a different part of your business. You could have a marketing automation CRM that automatically pulls in leads from your site, a call CRM that tracks your team's incoming calls and text messages, and then a contact- or conversation-focused CRM where you actually get your marketing work done.

All of them can work together with Zapier, sending your contact data from the app where it's capture to the app where you put it to work. And if you need to log interactions back to the original CRM, pushing that data back is just another Zapier automation away.



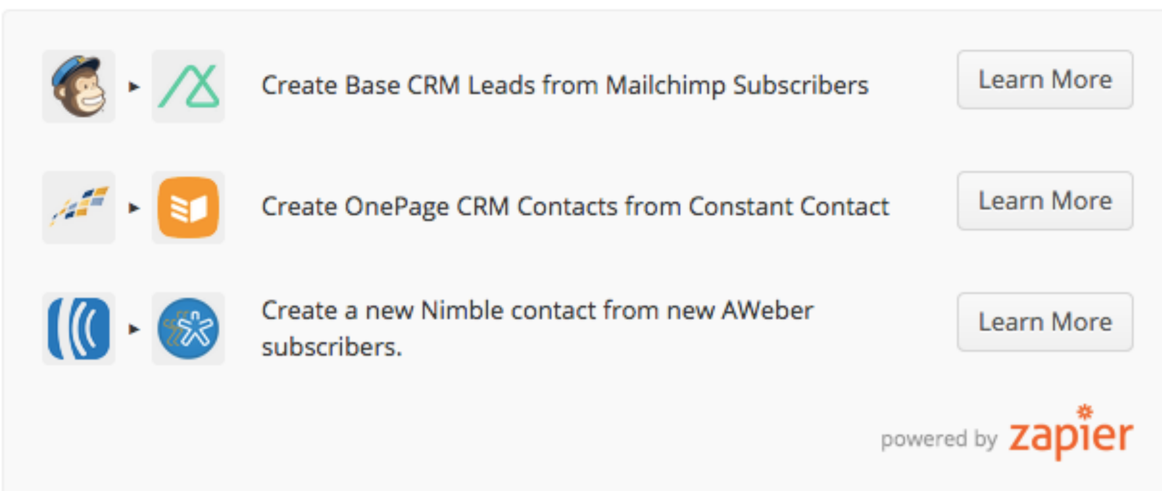
Zaps:

- [Automatically Create Pipedrive Deal from HubSpot Form Submission]
- [Create a new Zoho CRM lead from a tagged Intercom user]
- [Create new Salesforce contact from new Infusionsoft contacts]

Email Newsletters

Aside from purchases, email newsletters may well be the best way to gather potential leads. If you have a widely popular email newsletter, you can use filters to find subscribers from interesting companies that you'd like to add to your CRM. And if you have a more focused industry-specific email newsletter, every single subscriber might be a potential lead. Or, you might even find that the people who *unsubscribe* are worthy of a personal follow up.

Whether you want your full email list in your CRM, or find it time to break out the filters, you'll likely find a way to put your email newsletter to work for you with your CRM.



Zaps:

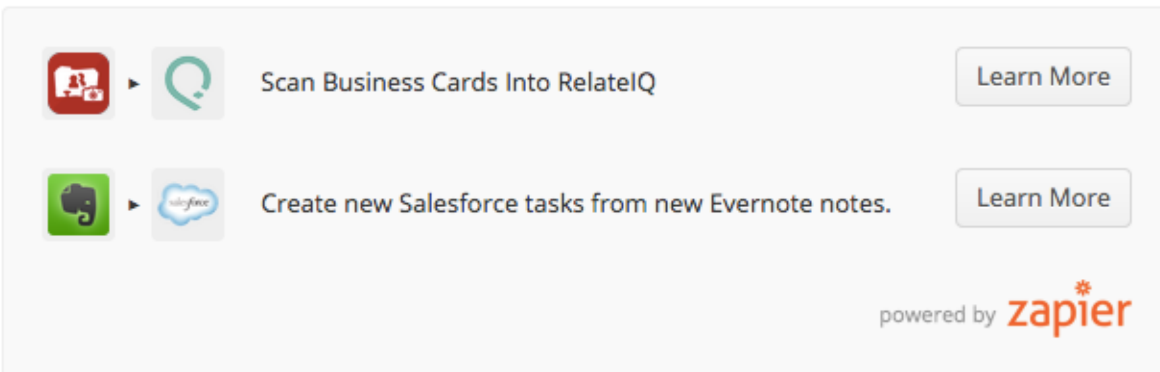
- Create Base CRM Leads from Mailchimp Subscribers
- Create OnePage CRM Contacts from Constant Contact
- Create a new Nimble contact from new AWeber subscribers

Tip: To discover potential leads from a large list, use a Zapier filter to *omit* signups with email addresses containing `gmail.com`, `outlook.com`, `yahoo.com`, and other popular email services.

Business Cards

There's almost no better tech parlor trick than scanning a business card and having your phone automatically recognize the contact info. With dedicated contact apps like FullContact Card Reader and even Evernote's built-in business card scanning—or just an OCR-enabled scanning app—it's no longer difficult.

Don't just surprise them when you scan their cards; surprise them later when you actually follow up since their contact data is now in your CRM. All it takes is a quick Zapier integration, and your scanned business card info can automatically show up in your CRM.

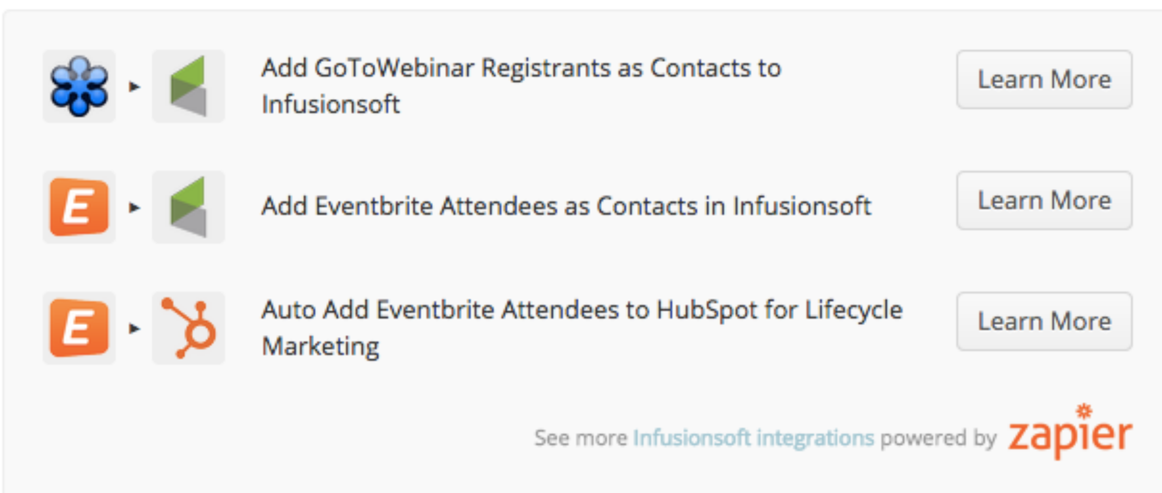


Zaps:

- Scan Business Cards Into RelateIQ
- Create new Salesforce tasks from new Evernote notes

Events

Or, if you're the one organizing an event—either online or in-person—you could preempt the need to scan business cards by having your event attendee's info automatically added to your CRM. It would just take a second to set up, and since they're already giving you their contact info when they sign up, it's as perfect a lead tool as purchase info. And, once again, if that'll be too many people—perhaps with a very large event—you could employ a Zapier filter to only include people from companies you want to target.



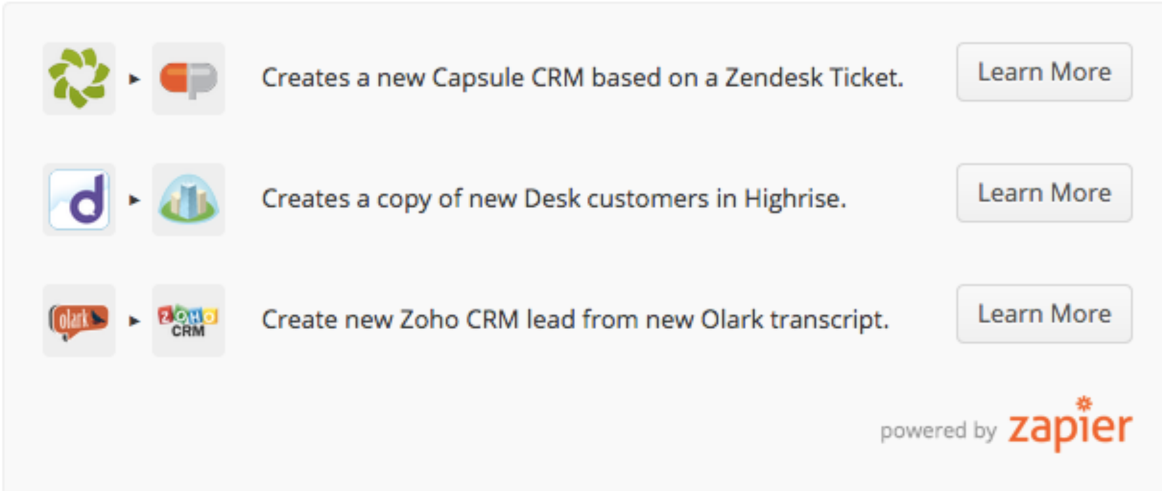
Zaps:

- Add GoToWebinar Registrants as Contacts to Infusionsoft
- Add Eventbrite Attendees as Contacts in Infusionsoft
- Auto-Add Eventbrite Attendees to HubSpot

Support and Chat

Online interactions aren't just in your personal inbox, they're also in your team's support app and perhaps an in-app chat you have for your customers. Again, every person you interact with there isn't a lead, but there will be people in your support systems that you'll want to follow up with later. Zapier can send those to your CRM with ease.

Here, as before, you'll want to put some filtering in place to only grab the most important contacts. Perhaps add a special tag in your support system for people to add to your CRM, and let Zapier pick up on it and send them over for you.



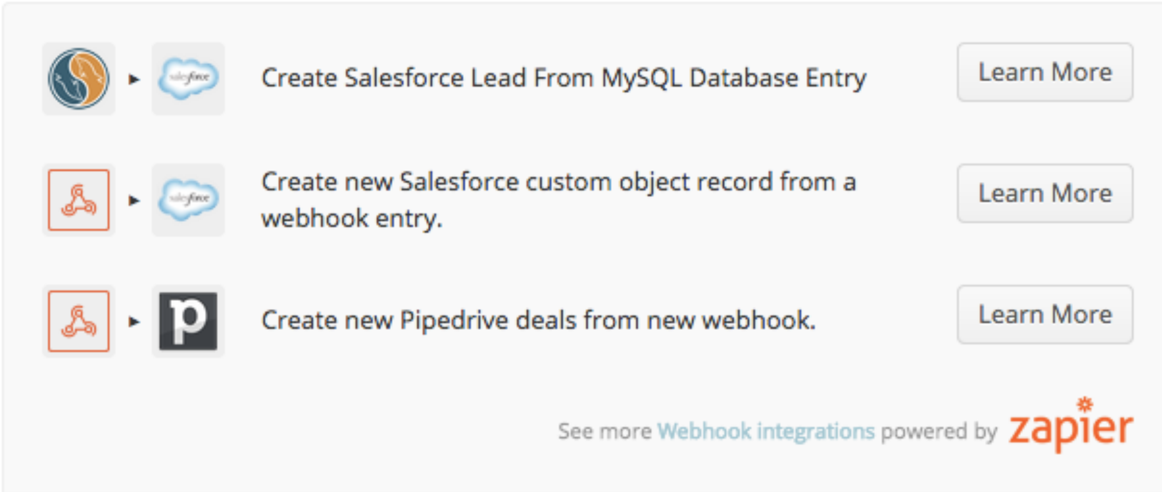
Zaps:

- Creates a new Capsule CRM based on a Zendesk Ticket
- Creates a copy of new Desk customers in Highrise
- Create new Zoho CRM lead from new Olark transcript

Websites and Databases

If you're using custom, in-house tools to gather leads, such as a hand-coded form app, or use a third-party app that doesn't work with Zapier yet, you can still integrate them with your CRM though Zapier. Rather than coding integration with each app you use, just connect your app to Zapier once and you'll get it to work with your CRMs and any of other 300-plus apps we support.

If your app has an API and you're comfortable working with it, you can add it to Zapier yourself with the Zapier Developer Platform. Or, if the apps support webhooks or are powered by MySQL or another database Zapier supports, you can add them inside Zapier with little more trouble than adding any other apps. You might even find you can get them to work *better* with Zapier that way since you get to pick exactly what get synced. Then, all that's left is hooking them up to your other apps and letting Zapier do the hard work automatically.



Zaps:

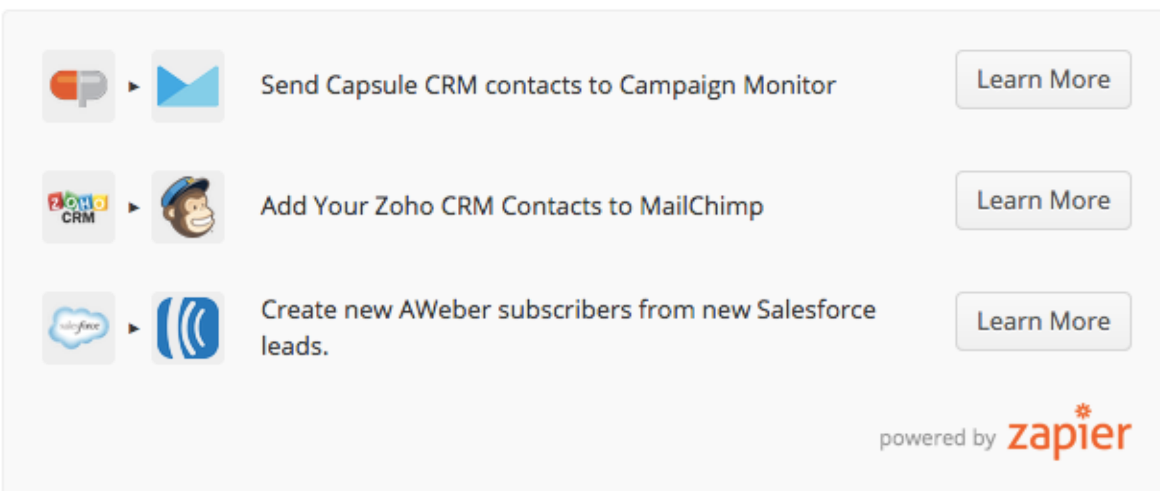
- [Create Salesforce Lead From MySQL Database Entry]
- [Create new Salesforce custom object record from a webhook entry]
- [Create new Pipedrive deals from new webhook]

Trigger Automation from Your CRM

You're now automating the addition of contacts to your CRM, but don't stop there. Your new CRM contacts can *trigger* automation themselves. Even if your CRM doesn't have any built-in marketing automation features, there are a variety of ways you can automatically reach out to your contacts, start off your new client projects, and make sure they get the info they need with Zapier.

Grow a Client Mailing List

Email newsletter lists aren't just a great way to get leads, they can also be a great way to followup with *all* of your leads. You could either add contacts to a drip campaign, which will email them a series of emails a set number of days after they've been added to the CRM, or you could just have an update email you send to all of your leads. Or, with tools like the new [drip email campaigns feature in MailChimp](), you can get the best of both worlds by starting them off with a drip campaign and then having them receive your normal newsletters, as well.



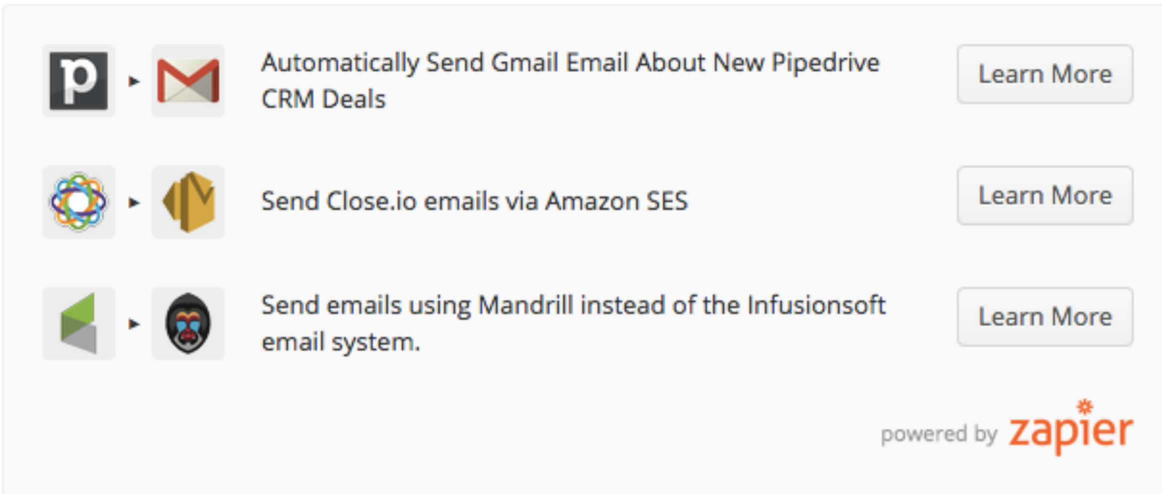
Zaps:

- Send Capsule CRM contacts to Campaign Monitor
- Add Your Zoho CRM Contacts to MailChimp
- Create new AWeber subscribers from new Salesforce leads

Send New Customers a Welcome Email

Perhaps a full drip campaign is a bit much for your business. Instead, you'd rather send your new leads a detailed email with info about your company and perhaps extra documents, important links and contact info, and more. For that, you'll just want to make an email template with all the important info, and then send it to all of your new contacts.

If you don't want to email people as soon as you've added them to your CRM, you could use the Zapier delay trigger to automatically email them, say, 3 days later. Or, you could use filters to just send the email when your leads are at a specific stage in your CRM, a great way to send extra info once the deal has been closed.

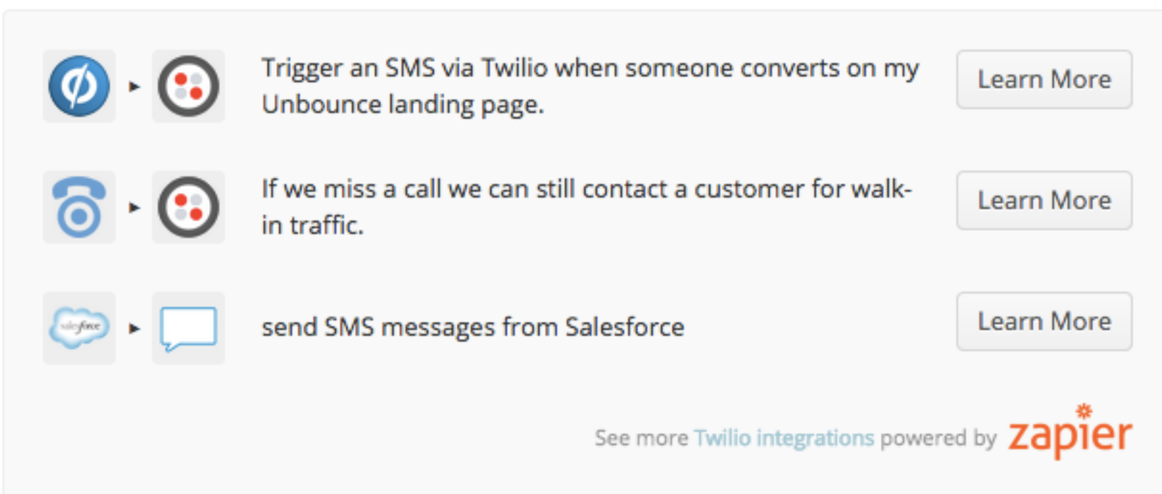


Zaps:

- Automatically Send Gmail Email About New Pipedrive CRM Deals
- Send Close.io emails via Amazon SES
- Send emails using Mandrill instead of the Infusionsoft email system

Call or Text Potential Clients

If your contacts are at larger companies that prefer a call, or your company is aimed at younger clients that'd far prefer a text message, that's possible, too. You'll just have to gather your contacts phone numbers, and then let Zapier automatically send them a text or call with a pre-recorded message. This, again, is a great place to put either status filtering or the delay trigger in place; you likely won't want to call people 5 minutes after they signed up to your newsletter and got automatically added to your CRM.

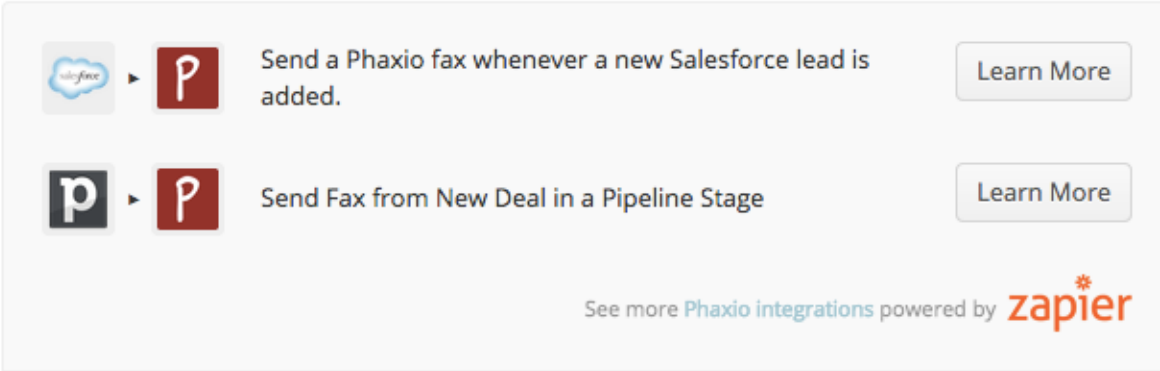


Zaps:

- Trigger an SMS via Twilio when someone converts on Unbounce landing page
- Send an SMS to missed calls in CallTrackingMetrics
- Send SMS messages from Salesforce

Fax Info to Businesses

If you work with older businesses, perhaps in more traditional, lower-tech fields like law, you'll likely find that you still need to send faxes. Most of those will need to be manual, but you might want to still send introductory info automatically. That's just as easy as sending an email or text automatically with Zapier's Phaxio integration. You can grab your contact's info from your CRM, and automatically fax them info about your company and the products or services you're selling. Or, you can use the note and document naming trick below to fax important info to them automatically as your projects progress.



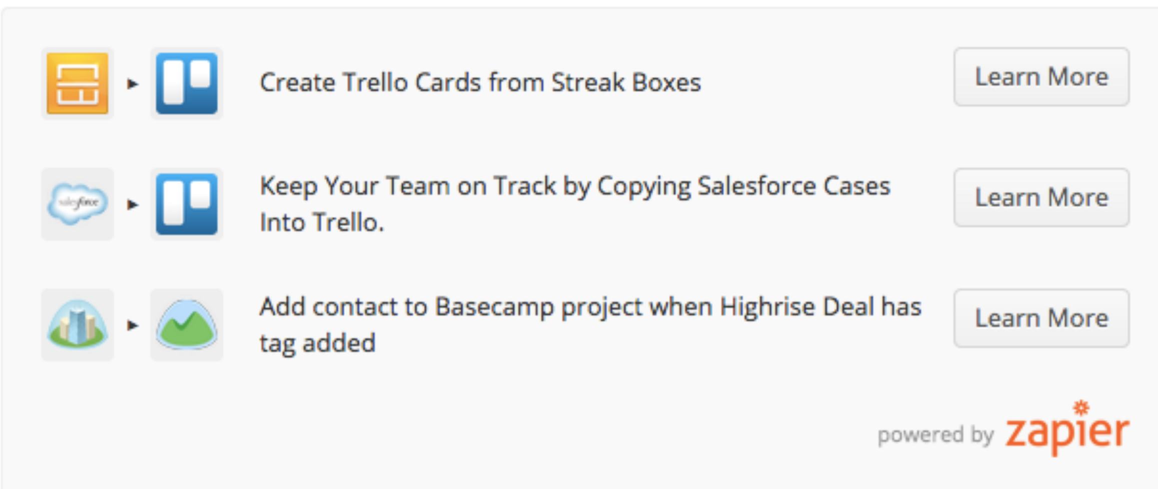
Zaps:

- Send a Phaxio fax whenever a new Salesforce lead is added
- Send Fax from New Deal in a Pipedrive Stage

Make New Projects and Tasks

Depending on your company and how you use your CRM, your team will likely have to get to work on some new tasks and perhaps a full project when you've added a lead or they've reached a particular stage of the sales process. So teach Zapier what's the crucial point for your work, and let it automatically make projects or task lists for your work. You can even have it add tasks to your CRM automatically if it supports that.

It can use your client's name or email when making the new project, so you can then automatically sync data from that project back to your CRM. And if you share your in-progress work with your clients, you can even add them to your project when it hits a particular stage.



Zaps:

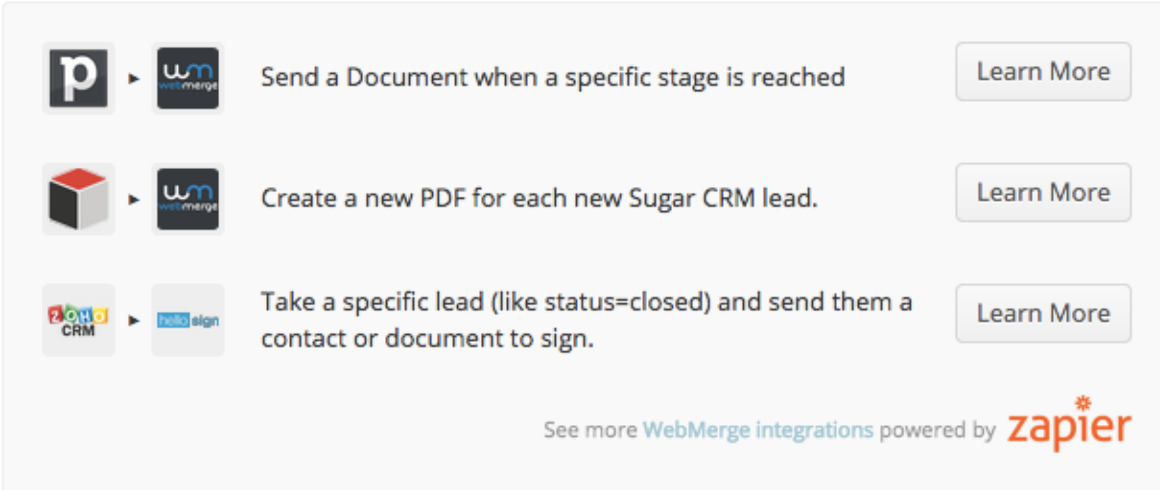
- [Create Trello Cards from Streak Boxes]
- [Copy Salesforce Cases Into Trello]

- Add contact to Basecamp project when High-rise Deal has tag added

Create Personalized Documents

Chances are, you'll need quite a few documents as your projects progress. You'll perhaps need to get them to sign a contract or release form; HelloSign's great for that, and Zapier can let it send out your signature requests automatically. Or perhaps you'll need to customize the documents with your client's names and addresses; WebMerge is the tool for you.

No matter what type of documents you need to create for your contacts, and how you need to use them, there's a way to get it automated with Zapier. Just have Zapier watch for leads that hit a particular stage, and it can then get the correct documents made quicker than you could fill in the text in a word processor yourself.



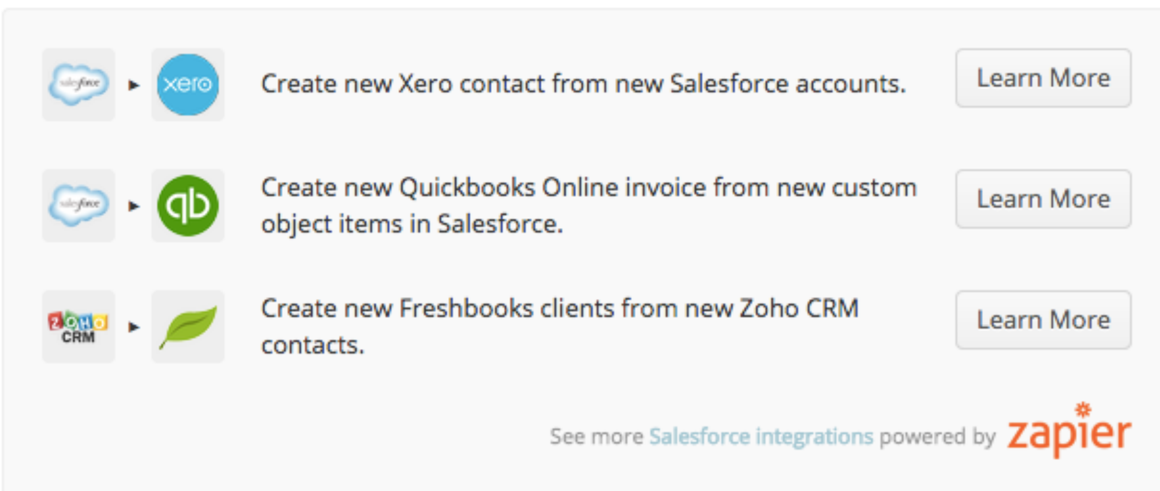
Zaps:

- [Send a personalized WebMerge when a specific stage is reached]
- [Create a new PDF for each new SugarCRM lead]
- [Send HelloSign contract to Zoho CRM lead]

Automatically Invoice Clients

You've finally sealed the deal, and have a new paid client. Congrats! Except, first, you're going to need to get them to pay.

All you'll have to do is have Zapier automatically add new CRM contacts to your CRM, so it can then send them quotes or invoices in the future. Then, have it watch your CRM for contacts who've completed your sales process, and automatically send them the correct invoice. Getting paid has never been easier.



Zaps:

- Create new Xero contact from new Salesforce accounts
- Create new Quickbooks Online invoice from new custom object items in Salesforce
- Create new Freshbooks clients from new Zoho CRM contacts

Note: If you're not using a dedicated invoicing app, you can instead use the aforementioned WebMerge integration to create invoice documents, or just have Zapier send them an invoice email with payment info from PayPal or another payment tool. That'd work as well, and wouldn't require another app.

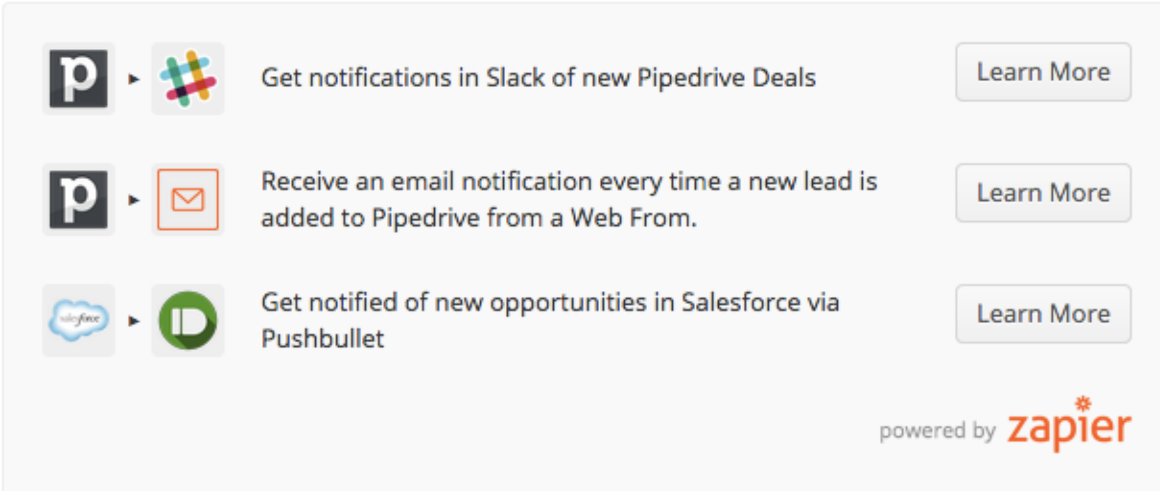
Stay Informed

Your CRM can likely notify you of some things—perhaps it sends you an email when you need to followup with a lead, or maybe it has a mobile app that informs you whenever anything happens. But you can do better than that. Just hook Zapier up to the place you prefer to get notifications, and let it tell you just the stuff you want to hear via filters.

Build Your Own CRM Notifications

Notifications are both the most convenient amenity and most annoying amenity about modern life. It's great to be alerted about anything, anywhere, anytime, but it can also be terribly annoying to have your phone beeping just because you accidentally tapped *OK* and let a new app send you notifications.

Your CRM likely has some activities you'll want to be informed about, but it'll also have a lot of info that's just noise. So pick what you want to be notified about, and use Zapier to filter your CRM data down to just that. Then, have it send the notifications the way you like. You could get an SMS or push notification, a ping in your chat app, an email, or just a list of everything in an RSS feed. Your choice.



Zaps:

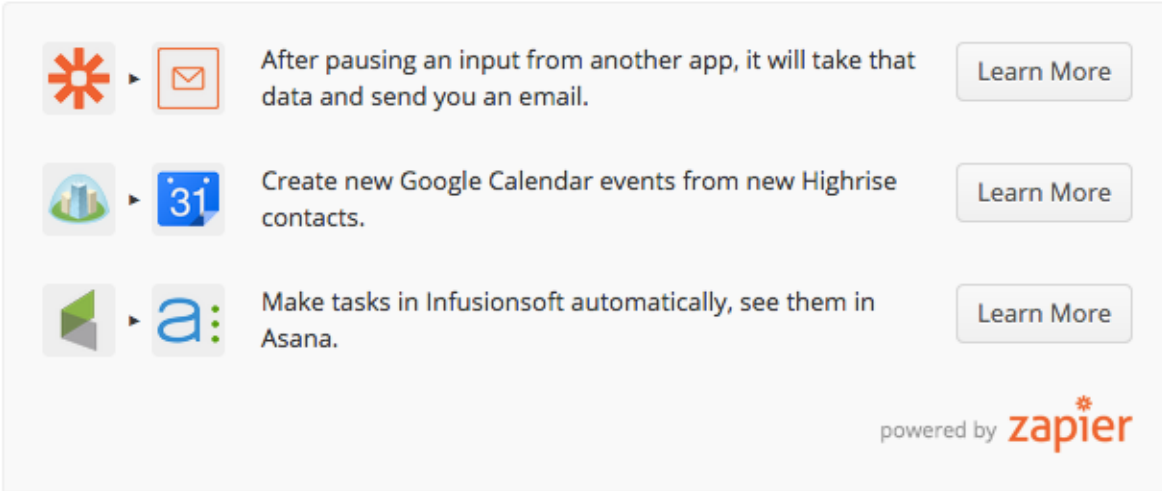
- [Get notifications in Slack of new Pipedrive Deals]
- [Receive an email notification every time a new lead is added to Pipedrive from a Web From]
- [Get notified of new opportunities in Salesforce via Pushbullet]

Remind Yourself to Follow Up

Everyone knows you should follow up on your leads; that's the very reason you've added them to a CRM in the first place. But it can be really easy to forget to follow up if you don't have something reminding you. Even if your CRM shows who you should follow up with, you won't see it if you don't open your CRM.

Instead, have Zapier automatically remind you a certain number of days after you've added a contact to your CRM, again using the delay trigger. You could have it send you a detailed email with info about your contact, or just a quick push notification with the contact's name. Or, you could have it add a new appointment to your calendar or a new task on your todo list for a few days later.

Or, if you're really forgetful, you could even have it do all of the above. Better be safe than sorry!



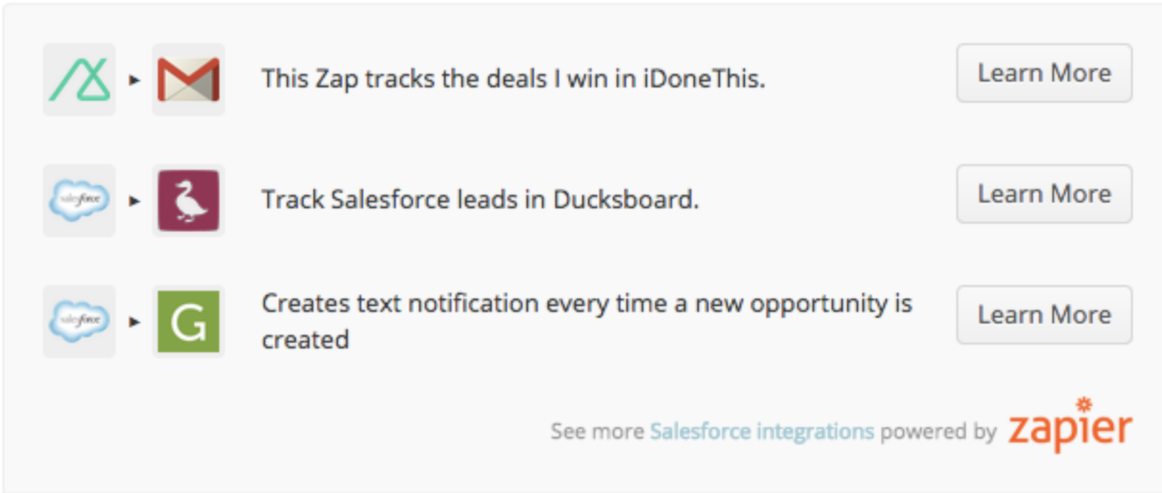
Zaps:

- After pausing an input from another app, Zapier will take that data and send you an email
- Create new Google Calendar events from new Highrise contacts
- Make tasks in Infusionsoft automatically, see them in Asana

Keep Track of What You've Done

One of the best motivation tools is a list of everything you've done or a dashboard that shows your progress. If you see a number of days without much accomplished, or if your stats start falling off the cliff, you'll quickly see that you need to start doing more. On the other hand, a full list of stuff done and a rising chart will be a nice reminder that stuff's getting done.

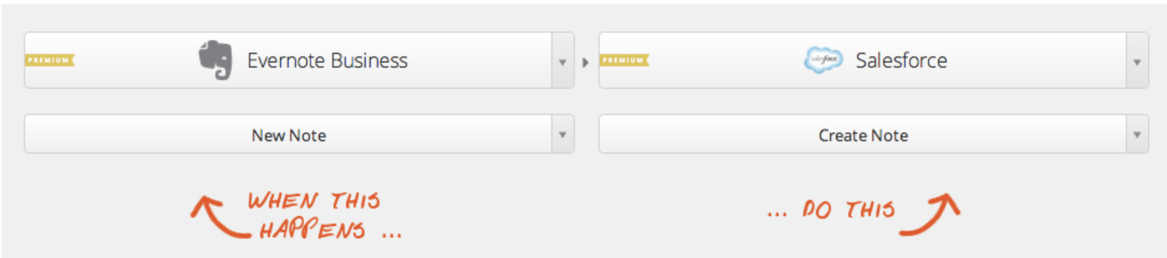
If you're doing a lot of work in your CRM, you might as well use it as part of your personal work metrics. You can send your new contacts or won deals to apps like iDoneThis or just append text to a note with a running log of your work. Or, you can increment numbers on your dashboard to track the number of contacts you have, the deals you've won this week, and more.



Zaps:

- Tracks the deals you win in iDoneThis via Gmail
- Track Salesforce leads in Ducksboard
- Creates text notification every time a new opportunity is created

Add Your Own Automation



The power to automate a CRM is in your hands with Zapier—coding skills aren't needed to integrate over 350 apps with your tool of choice. Whether you do that by using a pre-defined Zapier automation like the examples above or setting up a "Zap" yourself, getting started takes just minutes.

That's All, Folks!

You've made it! You've learned all about CRMs, picked out a great CRM, and have started automating your CRM work. Congratulations!

If you found this guide helpful, please pass it along—and then check out our other guides and books for more great resources to help you pick out great apps and use them effeciently in your work.

And, of course, be sure to try using Zapier to automate your work across the hundreds of apps that it works with today!

Dominos photo courtesy Jeffrey Pioquinto, SJ.

Business card photo courtesy Jake Mates.

Hand raising photo courtesy Maryland GovPics.

Match photo courtesy John Goode.

Thanks for reading!

~ The Zapier team