



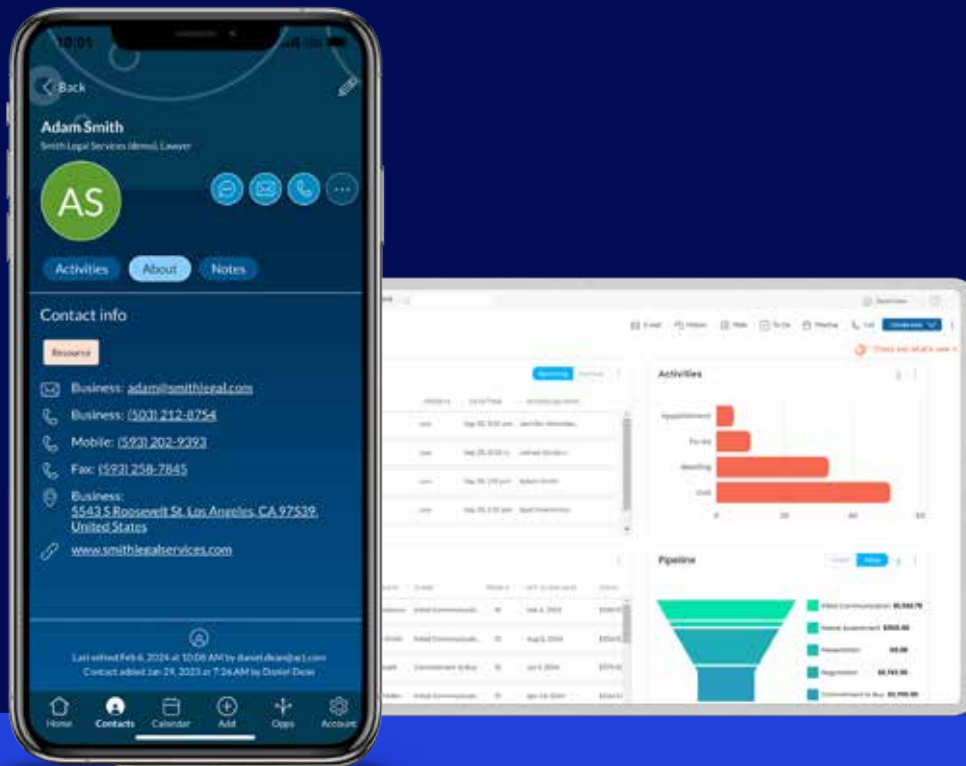
# How to choose the best CRM solution for your business

Not sure how to find the best CRM for your business? This guide is designed to cut through the noise and break down the key factors you should consider when selecting a customer relationship management (CRM) solution. From managing leads to improving customer service, we'll help you find a tool that fits your needs and sets you up for success.

- |  |   |
|--|---|
| 2   Introduction: Finding the best CRM for your business | 10   Usability is key                   |
| 3   The qualities of a modern CRM platform               | 12   Support when you need it           |
| 4   The benefits of using CRM software                   | 13   Choose scalable customization      |
| 6   Top CRM functions                                    | 14   How much does a CRM solution cost? |
| 7   How to choose the perfect CRM for your business      | 15   8 key things to watch out for      |
| 8   Expandability creates flexibility                    | 16   Take them out for a spin           |
| 9   Third-party integration                              |   |

# Introduction:

Finding the best CRM for your business



The **core functions of a CRM** are tracking, recording, and managing customer activity and contact information to provide you with details and insights that enable you to make meaningful business decisions.

However, customer-business interactions constantly change because of new platforms, communication modes, and trends.

As a result, CRM systems must cover all customer touchpoints to ensure you don't miss critical information. Think of a modern CRM platform as an integrated 360 solution that handles everything from lead generation and contact management to marketing automation and sales campaigns.

So how do you choose a CRM system that's **right for you?**

# Qualities to look for in today's CRM platforms



## Lead generation

Modern customer relationship management (CRM) platforms feature eye-catching signup forms and fully customizable landing pages that convert traffic into subscribers and marketing leads.



## Pipeline management

A CRM platform helps you analyze your sales pipeline by product, territory, sales stage, agent, region, and various other angles. This allows you to identify opportunities and weaknesses and apply targeted remedies to your sales processes.



## Mobile access

A CRM with a robust mobile application gives your sales team access to customer data. It empowers them to update records on the go, ensuring details are never lost.



## Friendly user interface

Data is useless if your teams can't analyze it. Modern CRM systems come with friendly user interfaces, visual data representations, and easily accessible options, instantly giving your sales and services staff the most critical information.



## Third-party integration

CRMs don't operate in isolation. They must seamlessly integrate with your existing tech stack and get to work without disrupting your processes.

# The benefits of using CRM software

Implementing A CRM system is a strategic move with long-term business benefits. It gathers data about your prospects and customers, giving you actionable business insights.

Here's how an integrated CRM directly benefits your business.

## Enhance collaboration between marketing and sales

An [integrated CRM system](#) dramatically improves collaboration between your marketing, customer service, and sales teams. With real-time data and a shared reporting system, marketing and support teams can quickly pass on information about interested leads or potential customers to the sales team.

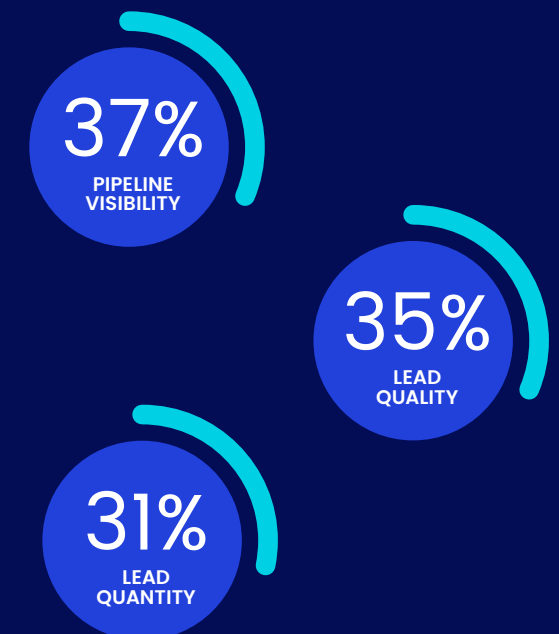
Likewise, your retention team gets a full view of a customer's history and satisfaction, helping them create more effective ways to keep customers engaged.

## Improve pipeline management

A CRM system boosts pipeline visibility, minimizes uncertainty, and enables more accurate sales forecasting.

Additionally, by regularly monitoring leads as they move through the pipeline, you can spot potential issues early and address them, ensuring smooth, uninterrupted progress.

In a [recent study](#), business executives highlighted the top three areas where CRM has made the biggest impact:



## | The benefits of using CRM software (continued)

### Boost productivity through automation

According to [Harvard Business Review](#), over 90 percent of professionals agree that automation improves productivity. A CRM system can take over many repetitive tasks that eat up hours of your team's time each month. From scheduling appointments and sending follow-up emails to setting reminders and assigning leads to sales reps, CRM automation frees up time so your team can focus on more important, meaningful work.

By automating these routine tasks, you not only increase productivity but also reduce the chances of human error. This means smoother operations, faster responses, and better overall efficiency across your teams.

“Research shows that **32 percent of customers** stop doing business with a company.”

“**90 percent of professionals** agree that automation improves productivity.”

### Build trust and improve customer relations

A CRM system helps you quickly address customer issues and provide timely solutions, which boosts customer trust and loyalty. It also gives you valuable insights into your customers' real needs and challenges, allowing you to raise your service standards and offer personalized solutions.

A CRM helps you anticipate customer needs by tracking past interactions and preferences. This makes customers feel valued and improves their overall experience with your company.



# | Top CRM functions

When choosing a CRM solution, you must carefully consider the features and tools you need to achieve your business goals.

Failure to set out your needs and priorities can mean you end up with an underperforming system, bloated with unnecessary features that hinder day-to-day usability.

Here are a couple of examples of CRM features you might need.

## On-the-go mobile access

A [Forrester study found](#) that 57 percent of executives had trouble maintaining customer engagement levels as remote work became more common in recent years, while 55 percent found that their outdated CRM systems made it difficult to access information.

If your sales teams need to access customer data on the go, you need a CRM with a robust mobile application that connects to your central database.

[The Act! Mobile App](#) provides executives with real-time customer data and features such as proximity search, allowing teams to focus on specific geographic locations and stay in touch with prospects and customers.

## Integrated marketing automation

[Forty-three percent of B2B marketers](#) agree that marketing automation improves customer experience. Another [study found](#) that lead quality rises by 80 percent for companies that rely on marketing automation and marketing automation also results in a staggering 451 percent increase in qualified leads.

For example, here's what Act!'s all-in-one CRM and marketing automation platform will do for you.

- Convert cold traffic into email subscribers and leads.
- Trigger automated email sequences at different stages of the customer lifecycle.
- Automatically create segments and assign tags to contacts based on their behavior and interaction with your business.
- Serve personalized content tailored to your audience's needs.
- Share free value with your audience, build trust, and boost sales and customer retention rates.

If your business could benefit from marketing automation, look for an integrated CRM system with modern automation capabilities.

# How to choose the perfect CRM for your business

When you're finally ready to choose a CRM system for your business, here are the three most critical steps to consider.

## Step 1 Identify specific goals and objectives

Are you aiming to boost sales, improve customer service, automate communication, or empower your sales teams with real-time customer data on the go? Defining your goals and setting measurable objectives will guide your CRM selection and ensure it aligns with your business needs.

Actively engage with stakeholders from marketing, sales, and other relevant business functions to understand their expectations from a CRM system.

“Studies have shown that a CRM can increase revenue by 245 percent and reduce lead acquisition costs by as much as 23 percent.”

Web FX

## Step 2 Assess your budget

The cost of implementing and running a CRM system can vary significantly based on your business requirements (from \$10-\$30 per user per month to \$500-\$1000 per user per month).

For instance, a company using a CRM solely for contact management can find a more affordable solution than a business that requires advanced features like marketing automation, lead generation, mobile apps, and other integrated functionalities.

While it's important to stay within your budget, remember to factor in the savings a CRM can offer by streamlining manual tasks and boosting overall efficiency.

[Studies have shown that](#) a CRM can increase revenue by 245 percent and reduce lead acquisition costs by as much as 23 percent.

So, consider the complete picture before making a call.

## Step 3 Make a list of features and functionalities

Start by collecting input from key stakeholders to create two distinct lists of CRM features and functionalities.

The first list should include the essential features for your business operations. These could include integrated contact management, marketing automation, landing pages, and sales pipeline management.

The second list should cover optional or nice-to-have features, such as a mobile app, social media integration, or other tools your team feels would enhance their workflow.

By finalizing these lists, you'll be able to select a CRM that meets your needs while staying within your budget.

# Expandability creates flexibility

Implementing a CRM solution is a long-term business investment. That's why it's critical to choose a CRM capable of expanding in scope as your business grows.

Scalability and third-party integrations are the two main qualities to look for when choosing a CRM to grow with your business.

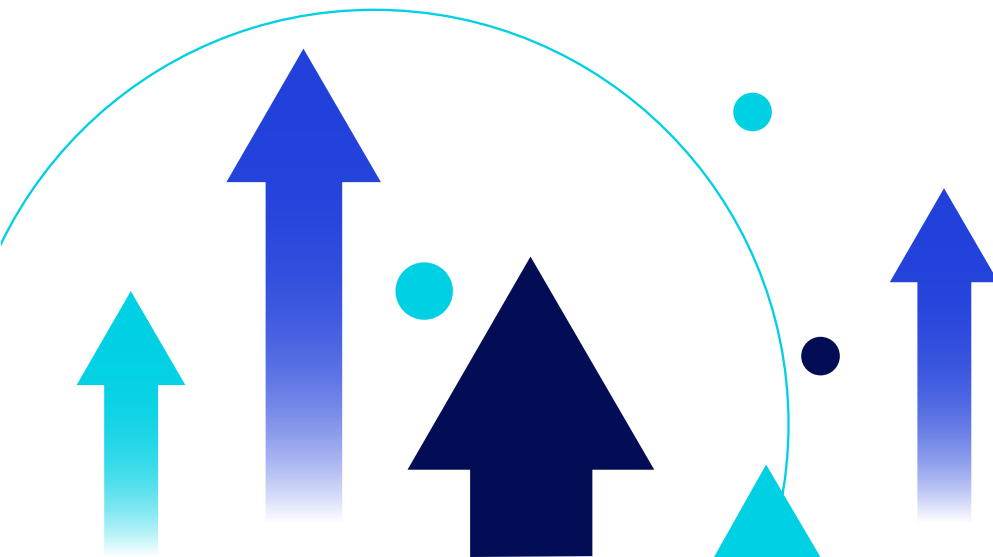
## Scalability

A scalable CRM ensures that even as your business expands, the system remains responsive and effective without sacrificing performance.

For example, a small business today might become a multi-location organization in the future. The CRM system must be capable of adapting.

To determine whether a CRM can scale with your business, look for the following:

- **Customization:** You should be able to tailor fields, forms, reports, dashboards, and pipelines to reflect the unique workflows and processes of your growing company.
- **Automation:** Look for a CRM that supports the automation of key processes such as lead generation, qualification, nurturing, follow-up, and closing. You should also be able to automate email marketing, invoicing, and customer service workflows to save time and boost efficiency.
- **Cloud-based architecture:** A cloud-based CRM is ideal for scalability because it offers flexibility and on-demand resources. Cloud systems allow your team to access the CRM from anywhere, making it easier to handle updates, manage data, and scale the system as needed.
- **Modular design:** A CRM with a modular design allows you to add features or modules over time. You can start with the core functionalities and then integrate new capabilities as your needs grow, without overhauling the entire system.





## Third-party integrations

Today's CRMs should empower you to connect with hundreds of popular apps that extend their power and reach. Act! Connect automatically moves info between Act! and the apps of your choice for:

- Business Productivity
- Sales & Marketing
- eCommerce
- Social Media
- Customer Service
- Back Office





## Usability is key

Whether it's bespoke or off-the-shelf, you need a CRM system that's easy for your staff to use. By their very nature, overly complex systems take longer to learn and are harder to work with, so any CRM solution you choose must have a clean and simple interface that's intuitive to use. That's why Act! is specifically designed to allow new users to get up to speed in just a few hours.

Because it is so easy to learn and use, Act! has become the first choice Customer Relationship Management tool for smaller businesses that don't have the time or resources to spend on long-winded software training. That greater usability also means that more people can learn how to use the system, creating a more responsive workforce who can answer and respond to customer requests, even when an account manager or salesperson isn't around.

Fewer than **40 percent of CRM customers**, according to CSO Insights, have end-user adoption rates of more than 90 percent.

# Usability is key (continued)

Open Opportunities

38 | \$57,892.00

Find contacts near you



Home



Contacts



Calendar



Opps



Add

Plus, Act! enables managers to make faster data-informed decisions. In Act!, actionable business insights are just a few clicks away: See dynamic, visual snapshots of real-time metrics covering sales productivity and performance, sales pipeline health, top-performing products, win/loss analysis, and more with interactive, graphical dashboards.

You can read how Day Trade Fun saved valuable time and gained exponential efficiencies by using Act! to manage their contacts and marketing efforts. Quick access to the information they needed freed up time for other crucial aspects of their business, such as training and growth initiatives.

Click [here](#) to read the case study.

Steep, long learning curves are something to watch out for, particularly with bespoke systems, which generally tend to be more complex. So, if you do go down this route, ensure that the vendor is strong both on the initial training they offer and their follow-up support.



## | Support when you need it

Of course, no matter how good the system is, a little help will always be needed at some point, which is why you should think of the CRM product and its supplier as a package.

That's the reason we provide a range of support options. First, we offer free onboarding with every subscription in addition to a robust [digital self-help](#) training resource center where you can watch a range of training videos, take Act! feature tours, or tap into our online [Knowledgebase](#). Or, if you need more specific help, you can call or live chat with our Technical Advisors as part of your Act! subscription.

And if you require more hands-on advice, our [Act! Certified Consultants](#) can walk you through everything from initial set-up, customization, and integration of your system to ongoing training.

## | Choose scalable customization

Customizing a CRM to fit your business processes can be a challenge. In fact, [18 percent of CRM buyers](#) list customization as a mandatory feature.

A CRM is a long-term investment, and having it tailored to your workflow is essential for efficiency and growth. However, building a fully customized CRM solution can be expensive, both in terms of development and ongoing support.

That's why it's more efficient to choose a CRM platform that covers most of your fundamental requirements while allowing you to add new features and functionalities as your business evolves.

This is exactly what Act! offers.

With over 60 customizable fields, Act! allows you to mold the system to your specifications.

Whether you need to manage emails, phone numbers, social media accounts, relevant documents, purchase histories, or customer preferences, Act! gives you complete control to tailor the system to your business.

This level of customization means you can zero in on the data that matters most. Plus, instead of locking you into an expensive all-at-once solution, Act! follows a “pay-for-what-you-need-when-you-need-it” approach.

This allows you to scale the system gradually, adding advanced features as your needs expand without unnecessary upfront costs.

To unlock even more potential from your data, Act! offers [Custom Industry Tables](#), which brings together complex data sets, unique business processes, and specialized industry practices.

This gives you the power to create a highly customized CRM solution that grows alongside your business — without the prohibitive costs of fully custom-built platforms.

**18 percent of CRM buyers** list customization as a mandatory feature.





## | How much does a CRM solution cost?

Typically, vendors of CRM products offer clear subscription-based pricing, though some may charge a flat monthly fee for a set number of users, and then require you to pay extra for additional services and users, which can come as a surprise. There may also be other hidden or set-up costs to look out for. So, before committing, do a reality check on both upfront and ongoing costs, as well as potential contract lock-ins that could see you having to stick with a product for longer than is ideal.

To make sure we meet the needs of smaller businesses, we offer transparent pricing for our scalable CRM and marketing automation software so that you know exactly what you are getting and how much it will cost, and can rest assured that it can grow with you.



## | 8 key things to watch out for when choosing a CRM solution

- ✓ Ease of use
- ✓ Onboarding, training resources & ongoing support
- ✓ Third-party integrations
- ✓ Customizable fields to suit your business
- ✓ Mobile app
- ✓ Robust security and data protection
- ✓ Transparent pricing, terms and conditions
- ✓ Free trial



## Take them out for a spin

Once you've narrowed down your top CRM selections, give them a try at no cost with a trial. Most CRMs offer a free 7-14 free trial to help you find your perfect-fit CRM.

We hope this information has been helpful in finding the perfect CRM solution for your business.

Here at Act!, we're here every step of the way, so don't hesitate to reach out with any questions. You can also check out our free 14-day trial (no credit card or download required) today.

As one of our customers puts it, "Act! is simple and makes life much easier!"

[Check out what our customers have to say about Act!.](#)

"Act! has been our lifeblood for more than 20 years — we rely on it for everything."

**Corrine Bryson**  
INEX Founder & CEO



## Why Act!?

Partnering in small business success for over 30 years, Act! helps you get and stay organized with affordable and easy-to-use CRM and marketing solutions, plus a helping hand every step of the way.

**Get organized, close more deals, and create happy customers for life.**

To learn more about Act! visit

[www.act.com](http://www.act.com)

Or call us at

**866-873-2006**

Connect with Act!



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