



**convergeHub**

#1 Easiest *Converged* CRM for SMB

**What You Must  
Ask For Finding  
an Easy CRM for  
SMB**

# What You Must Ask For Finding an Easy CRM for SMB



For finding an easy CRM for SMB, let us first break down the Customer Relationship Management software platform into individual components for a better understanding of this misused tool, which will most importantly help small business owners to make informed decisions when opting for their [preferred CRM](#) and bring growth in sales.

## Customer

***Definition: The person who gives you business for your product and services.***

- Who is your customer?
- Why did your customer choose to do business with you in spite of other options in the market?
- Who is/are your competitor(s)?

## Relationship

**Definition:** *The process of connecting with other human beings.*

- Whom would you like to communicate?
- How do you like to communicate?
- How do your prospects like to communicate?
- How do your existing/new customers like to communicate?

## Management

**Definition:** *The act of manipulating and cajoling people to perform tasks and duties from afar.*

In business, you cannot manipulate people but rather you can nurture them. Therefore, add a little love and see what happens.

So when you are looking for an easy CRM for SMB, ask yourself some primary questions that start with “What must I have?”

## 1. Do I need Salesforce Automation?

### What is Salesforce Automation?

SFA or Salesforce Automation is a technology that helps in automating common online business management tasks like inventory tracking, processing sales, logging and reporting of your customer’s interactions and others. SFA can also aid you in creating and for analyzing performance and sales forecasts and handling:

- Lead management
- Contact management
- Region / Quota management
- Opportunity management
- Implement sales methodology
- Partner management

## 2. Do I need Marketing Automation?

### What is Marketing Automation?

Marketing Automation is a technology and a software platform, which is designed exclusively for the marketing department of an organization, to more effectively market their products and services. Marketing Automation covers multiple channels both online and offline and automates repetitive tasks.

### Here is an example:

#### Online Marketing Automation channels

- Email
- Social Media
- Website and others

#### Offline Marketing Automation channels

- Direct mail
- SMS
- Fax
- Voice broadcast and others

## Automated repetitive tasks

- Registration reminders
- Live events
- Trade show attendance
- Webinar and others

Marketing automation also helps in Web forms submission, List segmentation, and creates Follow-up sequences.

## 3. Do I need Reporting and Analytics?

If you cannot measure your company's performance, you cannot improve it. Here are a few most common report structures that you need in your easy CRM for SMB.

- Scheduled reports
- Customizable forecasting reports
- Proactive alert reports
- Comprehensive library of pre-made reports

## 4. Do I need a shared database?

The shared database helps everyone on your sales, marketing, accounts, and customer support team to access the CRM database.

You can opt for shared database functionality in a CRM for performing the following:

- Sales tracking
- Customer service
- Email marketing

## 5. Do I need an “In the Cloud” or “On Site” CRM?

Software-as-a-Service (SaaS) is a technology that has been prevalent in the market for decades. Most easy CRM for SMB are cloud based CRMs, like [ConvergeHub](#), which is the #1 *Converged* CRM for SMB.

According to a study done by [Nucleus Research](#), more than 80% of SMB organizations that adopted cloud-based CRM achieved a positive ROI.

Therefore, unless you want to mess with your own server and bear the maintenance and support costs associated with it, it is best to outsource your CRM from customer relationship software development companies.

The benefits of using a cloud-based CRM are:

- Easy upgrades
- Predictable costs
- Fast deployment
- Enhanced security
- Reduced need for staff expertise
- Reduced “customization”

## 6. Do I need third-party integration?

There is no perfect, all-in-one CRM software platform out in the market today for small and medium size businesses. Even large enterprises are bolting on additional tools to get more out of their CRMs. Here is a list of the most used [third party tools](#) used by small and medium businesses for enhancing the efficiency of their CRM software.

- Microsoft Outlook
- Fax
- PandaDoc
- Dropbox
- Skype Call
- Google Drive
- RingCentral
- Box
- QuickBooks
- Google Calendar
- Gmail
- Click to Call
- DocuSign
- GoToMeeting
- IMAP
- Google Map
- SMS (Twilio)
- NexInteractive
- Google Contact
- MailChimp
- Zapier and others

## 7. Do I need a mobile CRM?

Constant and seamless access to customer information means that time away from the office does not necessarily mean you have to be “away from the office.”

Being able to be connected to CRM software from remote locations allow your team to be far more productive than ever before.

In a recent study done by [Nuclear Research](#), an information technology research firm specializing in investigative research is of the opinion that mobile access to a CRM increases team productivity in SMBs by more than 14.6% with a further 4 in 10 mobile users of mobile CRM reporting improvement in productivity by more than 22%.

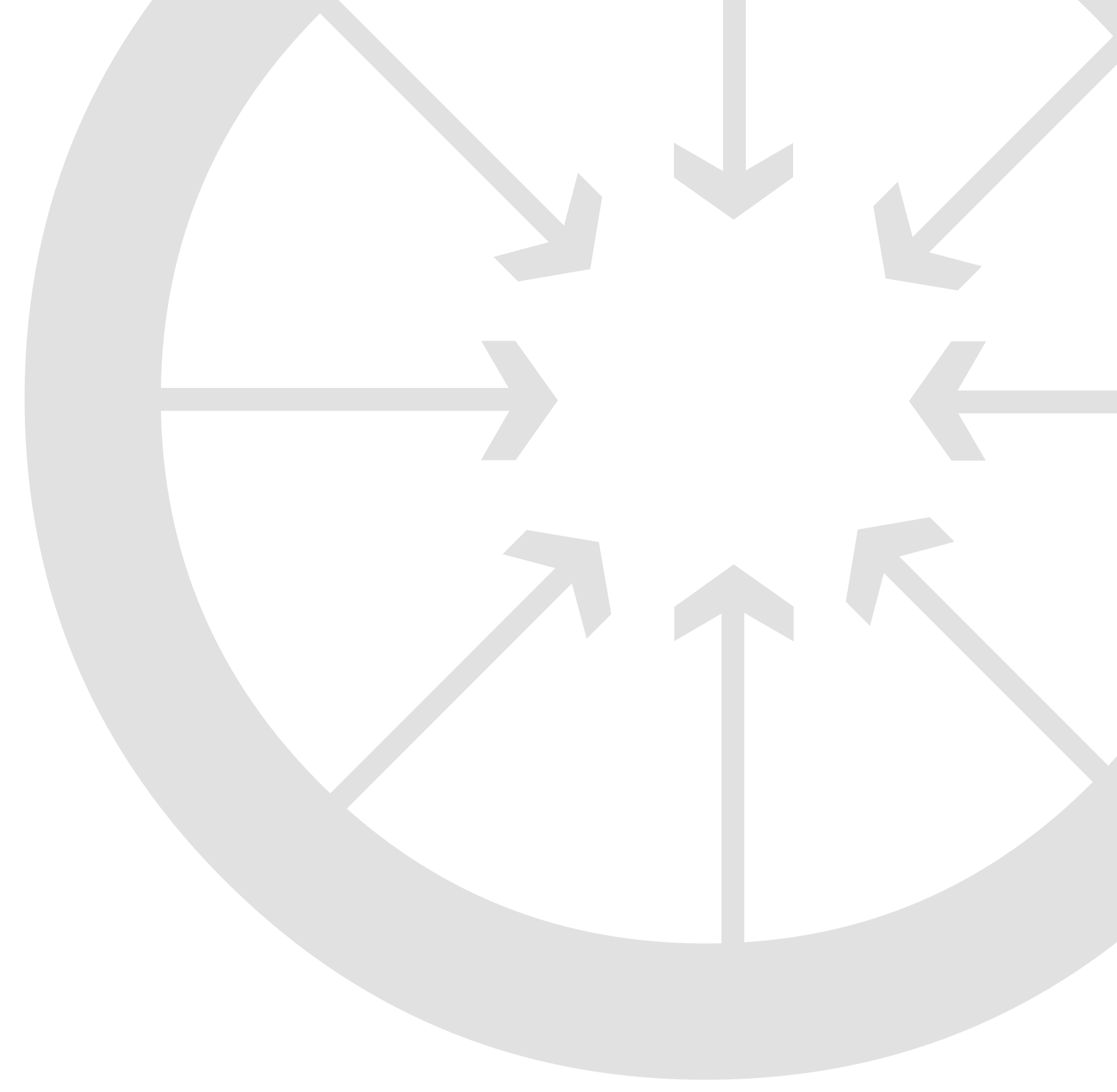
With tools to respond fast along with customer data always at your fingertips, mobile CRM helps employees close more deals with fewer interactions and less time.

This allows sales reps to spend more time prospecting or find new avenues for exploring untouched sales opportunities.

## Takeaway

Now that you are aware how you can choose the best CRM solution for your SMB, find a platform that has both great onboarding for new clients and great customer support. That is why when you talk about buying an easy CRM for SMB you can rely on [ConvergeHub](#), which has all the features listed above that are needed for a modern day CRM, that too at an affordable price.





ConvergeHub is the #1 easiest *converged* CRM for SMBs. It can manage all of your sales, marketing, support, and billing needs, with a *converged*, full-featured, yet extremely easy-to-use CRM that is priced within reach.

The features of ConvergeHub are optimized for small to medium sized businesses that have the same needs as the large corporations, but don't have massive budgets to integrate or pay for expensive add-ons. All features in ConvergeHub CRM are built-in, which works together flawlessly, and have a uniform look and behavior. You can use ConvergeHub to automate your typical day-to-day tasks and marketing.

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