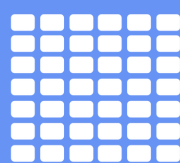




A Beginner's Guide to CRM Software



Mirabel's

MARKETING
MANAGER

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Introduction

What is the most fundamental part of any good business?

Is it the sales process? After all, how can a business be successful without a proper process for selling to customers?

Is it marketing? Without marketing, how would you attract customers to your brand in the first place?

Though these are essential elements, a business would be nothing without its ***customers.***

In this white paper, we'll discuss the importance of managing your customer relationships using a game-changing software that will streamline the bulk of your business processes.

What is a CRM?

A Customer Relationship Management system, or CRM, is a tool used to manage clients, track their digital interactions, and, ultimately, improve customer relationships.

Generally speaking, proper implementation of a CRM helps optimize sales and marketing efforts, generate leads and, of course, grow your business.

A robust CRM also gives helpful insight into your sales and marketing efforts through thorough reports and analytics.



CRM Features

Though the capabilities of a CRM vary depending on the software, most are equipped with a few basic features.

KEY FEATURES

- + EMAIL, FORM, AND LANDING PAGE BUILDERS
- + WORKFLOWS
- + PIPELINE MANAGEMENT
- + MARKETING ATTRIBUTION
- + REPORTING & ANALYTICS
- + THIRD-PARTY INTEGRATIONS

Email, Form, and Landing Page Builders

Customizable emails are essential to any successful marketing campaign or sales follow-up. Forms and landing pages allow you to capture email addresses efficiently.

Leads that fill out these forms on landing pages are automatically recorded in your CRM, and you no longer need to worry about importing or exporting customer data.

An automated follow-up email is then sent welcoming them to your contact list.

A CRM that harnesses the power of these features is all the more valuable.

Workflows

Workflows automate actions based on specified triggers. So, when a certain event occurs, it will trigger an action in response.

This has various practical applications. For example, you can set up a notification email to be sent to all sales reps when a new lead is recorded in the system.

Or, you can facilitate customer support by having clients fill out an automated form delineating their issue. Now, the service employee knows exactly what the client needs going into the conversation.

You can even automate processes, such as client and employee training, content marketing, requests and approvals, and customer onboarding.


Pipeline Management

Pipeline management is the concept of overseeing, and simplifying, the sales process.

Pipeline management is possible thanks to a few CRM functions: sales forecasting, sales process analysis, and lead scoring and qualifying.

Sales Forecasting: The estimation of revenue that could potentially be generated from anticipated sales.

This helps companies make informed business decisions, giving insight into how resources should be managed in light of the potential incoming revenue.



Sales Process Analysis: The exercise of analyzing your sales process to ensure an optimal customer experience.

This allows errors to be identified and amended quickly and efficiently. It's also a more accurate method of measuring employee productivity.

Lead Scoring and Qualifying: The process of attributing scores to leads based on specific actions and gauging their quality accordingly.

This informs sales team decisions, as they prioritize their time and resources to the most qualified leads first.

These features streamline your process to speed up sales, increase the number of leads, and ultimately bring in more revenue.

Marketing Attribution

Do you know where your marketing dollars go and what return on investment (ROI) they generate? An overwhelming number of companies play a glorified guessing game when determining ROI.

Marketing often involves the distribution of content on various platforms. Knowing exactly which platforms are producing the most quality leads helps you decide which channels to spend on and which aren't working in your favor.

Most CRMs provide marketing attribution data that gives you direct insight into which channels are producing the most leads, so not one dollar of your spend is unaccounted for.

Reporting and Analytics

This is a must-have for lead management software. You need to be able to analyze the bigger picture when it comes to sales activity (or inactivity).

You should also be able to easily access data, such as lead sources to gauge which channels are performing best.

Ultimately, reports help identify any issues impacting the sales pipeline. This informs you of what to fix, rather than wasting time and resources trying to find what's wrong, or worse, not being aware of an issue in the first place.



Third-party Integrations

Third-party integrations make it easy to import existing data from other email or landing page platforms into your CRM.

This is crucial, as it allows you to manage data from all channels in one convenient place, while streamlining data transfers.

You can also maintain existing email and landing page templates, as they can be tedious to recreate.



Who should be using a CRM?


The short answer is any business looking to optimize their sales and marketing efforts.

However, having a CRM in certain situations is especially helpful.

You should strongly consider getting a CRM if your company has (a):

High or suddenly increased lead flow. If your company is getting more new leads than it can feasibly manage manually, an automated system is essential.

CRMs track all new leads, along with every individual digital interaction with your brand and sales reps, so no prospect falls through the cracks.



Long, complex sales process. It's difficult to track every step of lengthier sales processes, which are very common in B2B industries.

With a CRM, you can track everything from a customer's first interaction with your brand to the initial contact from your sales reps.

This allows you to both monitor leads as they progress through your pipeline and oversee your employees' efforts to convert the lead into a customer.

Multifaceted marketing strategy. As we mentioned earlier, when you're running marketing campaigns on various channels, it's difficult to identify which verticals are contributing the highest quantity and quality of leads.

A CRM allows you to determine where every lead comes from, which channels are performing best, and identify low-performing channels.

Tedious business processes. From reports to follow-up emails, most business processes are automatable. This saves your employees from the constant repetition of laborious tasks.

Room to improve customer service response. A prompt response to customer service requests is as essential as timely follow-ups with leads.

Make sure you're addressing customer concerns as quickly as possible to maintain their confidence in your brand. Automating this process ensures that your response is not only timely, but consistent for all customers.



Benefits of Using a CRM

We've already mentioned a few ways that a CRM benefits your business. To summarize, let's discuss the primary advantages that a CRM allots.

Lead Generation

Automating email campaigns, creating landing pages, and implementing forms are all key in generating leads. With a CRM, you can aggregate the power of all these elements.

When a user fills out a form on one of your landing pages, their information is recorded directly in your CRM. You can set up a workflow to send an automated welcome email to new subscribers.

Customer Retention

Efficient management of customer data makes it easier to address their concerns, update contact information, and onboard new clients.

Being consistent with your customers by automating these processes leads to a higher trust in and more loyalty to your brand, which helps you retain existing customers.

Streamlining Processes

Again, being able to simplify business processes through automation is a game-changing timesaver.

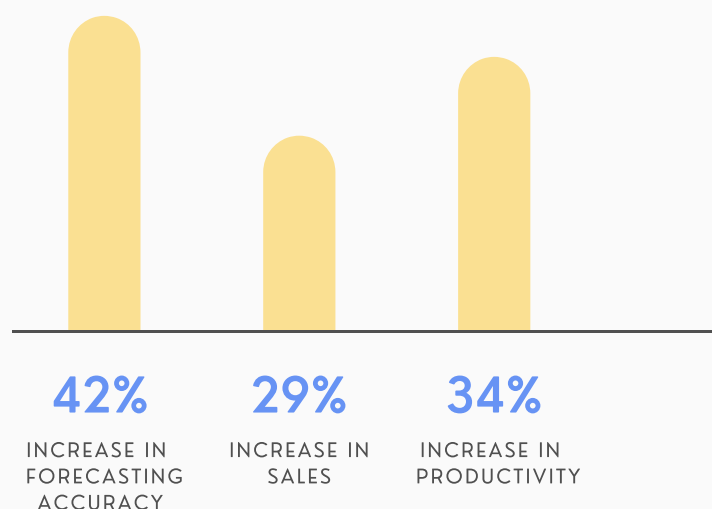
Your employees can shift their focus to following up with leads or creating marketing content rather than wasting time repeating the same processes over and over.

Cross-Departmental Synergy

It's difficult for different departments within your organization to coordinate tasks and exchange critical information. This is especially problematic for teams that complement each other, such as marketing and sales.

Processes go much smoother when the intel gained by marketing teams is communicated to sales representatives. Now, they can go into client meetings with all the information they need to close the deal.

BUSINESSES THAT USE CRMS REPORT:



SOURCE: [NUTSHELL](#)


How to Choose the Right CRM

While deciding whether or not you need a CRM is pretty black and white, choosing the *right* CRM for your business has quite a few variables. Some of those include the following:

Budget

This is the biggest factor to consider when making any company decisions, and CRMs are no different.

Of course, you want to ensure that the chosen CRM meets all of your company needs. Realistically, as long as your CRM is capable of the features we mentioned earlier, you should be able to leverage it effectively.



So, no need to push your budget to its limits by opting for the most expensive and robust CRM out there. Choose one that's within your budget, and remember that you can always upgrade to a more complex system as your business, and budget, grow.

Company Size

Some platforms are specifically made for small businesses, while others are better suited for enterprises. So, it's important to take your company size into account when choosing a software.

You should also be realistic about your company's future growth. If your company is growing at a tremendous rate, choose a lead management software that can handle it.

Integrations

We mentioned it earlier as a feature your lead management software should have. Integration capabilities are so important that we're emphasizing it again.

The integration capabilities of a software you're considering should be one of the main factors guiding your decision-making.

If you plan to continue using specific tools for email marketing, landing pages, or e-commerce, check that your new lead management software integrates with your existing tools.

If not, you run the risk of losing time, money, and irreplaceable data.

Industry

Though flexible platforms can be used across every industry, you may prefer to use one better suited for B2B- or B2C-only operations.

Additionally, you may choose to go with a CRM that was created with your industry in mind.

A software that's designed to support your specific industry likely has additional, valuable features and customer support that you won't get when you choose a more generic system.

For example, The Magazine Manager is a CRM made specifically for magazine publishers while The Newspaper Manager is designed for newspaper publishers.

Because they're made for the publishing industry, these software have exclusive features, such as ad invoicing, flat-planning, and a virtual newsstand.

Complexity of Software

Typically, advanced features and customization options require a more complex platform.

Initially, this seems desirable, but you need to consider whether those features are needs or wants.

If you determine that you need these advancements, you should consider if the amount of training required to make the most of those features is in your company's best interest.

If you think that time could be better spent elsewhere, consider a simpler software solution.

As we mentioned earlier, going for a simpler—or cheaper—solution doesn't mean you're compromising quality. As long as it has the features we mentioned, you're in good shape.

Top CRM Software

With all these considerations in mind, it's time to dive a little deeper and look into some of the CRM softwares out there.

Hubspot SalesHub

It's borderline criminal to have a list of the top CRMs and not include HubSpot. The marketing and sales software platform took the industry by storm and is even credited with coining the phrase "inbound marketing."

Their software, needless to say, is extremely comprehensive. Its features include:

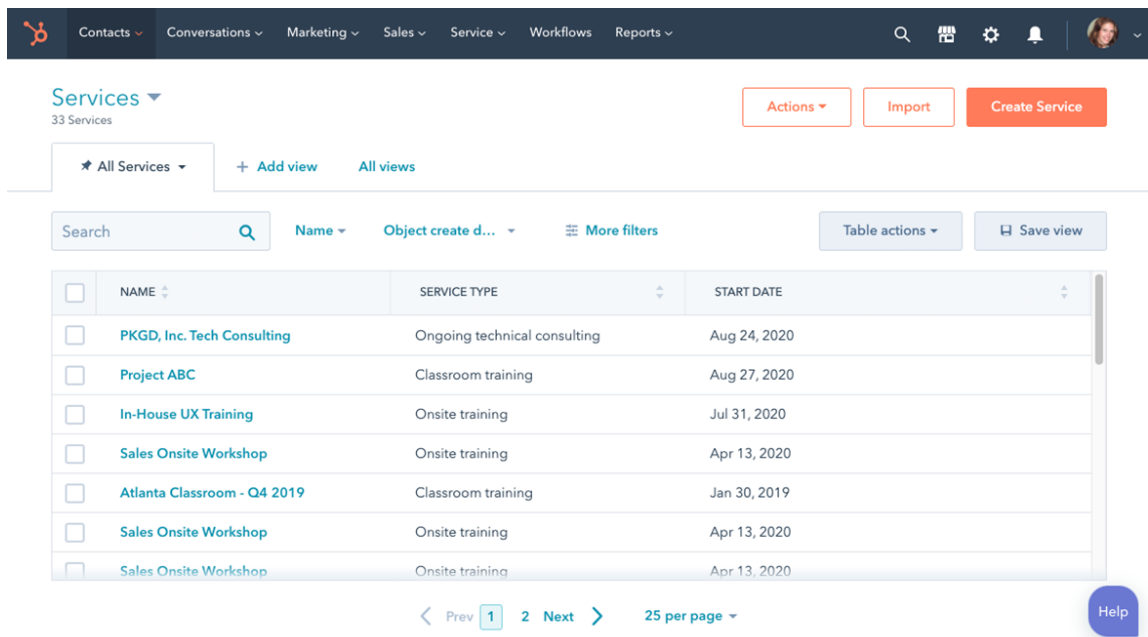
- Contact management
- Meeting scheduling
- Live chat
- Reporting dashboard
- Predictive lead scoring
- Forecasting

HubSpot even has a free plan that contains all the features you need to get started with customer relationship management.

While HubSpot may be the ideal solution for enterprises, it's not right for everybody.

For many clients, it's simply too expensive. Many smaller businesses can't justify the cost of the software against their incoming revenue.

HubSpot's expansive feature suite drives up the cost of the platform as well as the training and support cost of the software.



The screenshot shows the HubSpot Services page. At the top, there's a navigation bar with links for Contacts, Conversations, Marketing, Sales, Service, Workflows, and Reports. Below this, the 'Services' section is active, showing 33 services. There are buttons for 'Actions', 'Import', and 'Create Service'. A search bar and filters are present. The main table lists services with columns for Name, Service Type, and Start Date. The table is paginated, showing 1 of 25 items per page.

	NAME	SERVICE TYPE	START DATE
<input type="checkbox"/>	PKGD, Inc. Tech Consulting	Ongoing technical consulting	Aug 24, 2020
<input type="checkbox"/>	Project ABC	Classroom training	Aug 27, 2020
<input type="checkbox"/>	In-House UX Training	Onsite training	Jul 31, 2020
<input type="checkbox"/>	Sales Onsite Workshop	Onsite training	Apr 13, 2020
<input type="checkbox"/>	Atlanta Classroom - Q4 2019	Classroom training	Jan 30, 2019
<input type="checkbox"/>	Sales Onsite Workshop	Onsite training	Apr 13, 2020
<input type="checkbox"/>	Sales Onsite Workshop	Onsite training	Apr 13, 2020

Salesforce

Another key player in the CRM industry is Salesforce. It's a cloud automation software that's practically made for enterprises.

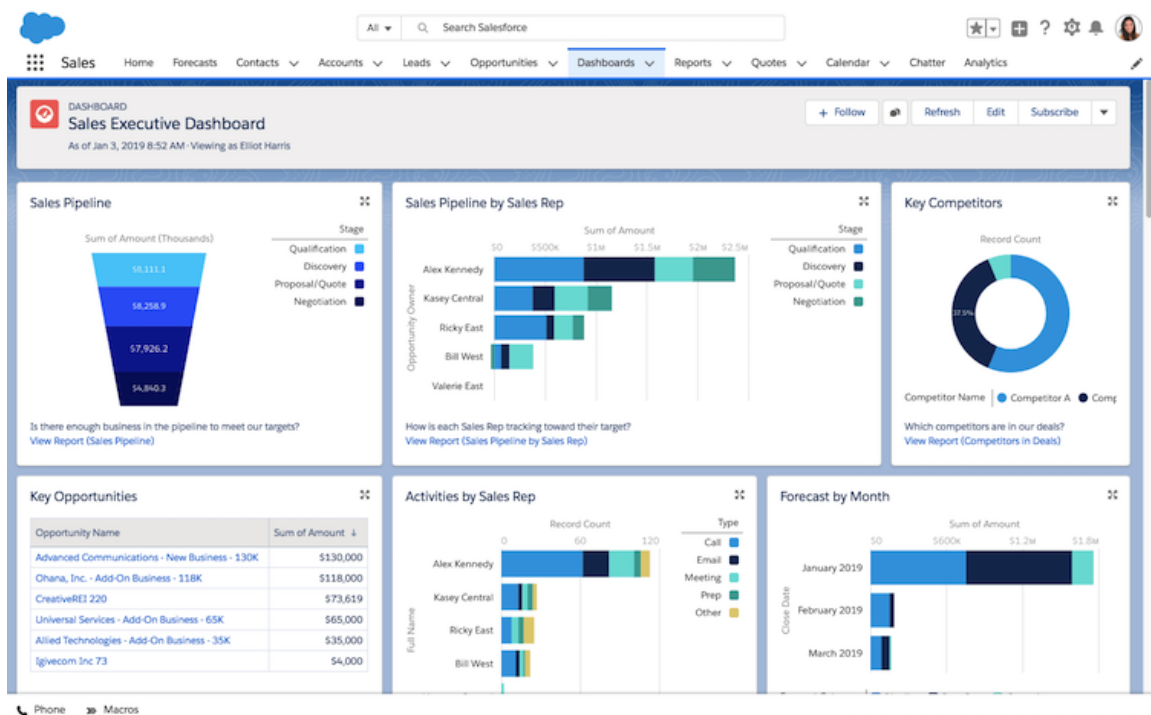
Some of its features include:

- Contact/account, pipeline, and task management
- Territory and quota management
- Desktop integration
- Reporting
- Customer contract management
- Forecasting

Additionally, Salesforce is capable of integrating with most major software providers, which is just the tip of the iceberg.

Salesforce is a very powerful system that encompasses all your business needs into one easy-to-use platform.

Similar to HubSpot, however, Salesforce's robust library of features is best suited for those who have technical experience or ample time to learn all it has to offer.



Mirabel's Marketing Manager

In addition to thorough marketing automation features, Mirabel's Marketing Manager also offers a fully functional CRM.

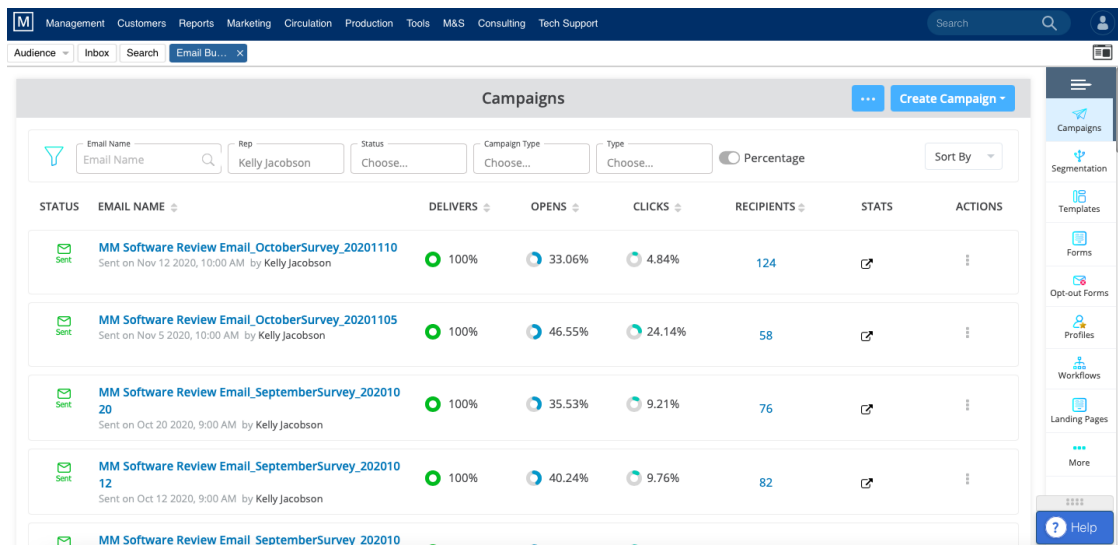
Marketing Manager boasts the following features:

- Robust, user-friendly email marketing and landing page builders
- Workflow automations
- Built-in email verification tool that filters out unknown and invalid email addresses
- Thorough insights into website user activity
- Pertinent data and contact information to identify unknown website visitors
- Real-time digital interactions to facilitates collaboration with sales teams
- Tracks lead clickstreams in an easy-to-read timeline
- Lead qualifying/scoring and sales forecasting tools

This affordable software also facilitates communication between sales and marketing teams by allowing them to request and segment customer feedback. Users can also include notes on contact interactions to keep everyone on the same page.

If you're looking for an all-in-one marketing and sales solution, Mirabel's Marketing Manager might be right for you.

Most companies house their marketing automation software and CRM in separate platforms with separate price tags, but Mirabel's Marketing Manager consolidates the most important functions of both into one powerful platform.



The screenshot displays the 'Campaigns' section of the Mirabel Marketing Manager software. The interface includes a top navigation bar with various menu items like Management, Customers, Reports, Marketing, Circulation, Production, Tools, M&S, Consulting, and Tech Support. Below this, there's a search bar and a 'Create Campaign' button. The main area shows a table of email campaigns with columns for Status, Email Name, Delivers, Opens, Clicks, Recipients, Stats, and Actions. The table lists four campaigns, all marked as 'Sent' and showing 100% delivery rates. The right sidebar contains icons for Campaigns, Segmentation, Templates, Forms, Opt-out Forms, Profiles, Workflows, Landing Pages, and a Help button.

STATUS	EMAIL NAME	DELIVERS	OPENS	CLICKS	RECIPIENTS	STATS	ACTIONS
Sent	MM Software Review Email_OctoberSurvey_20201110 Sent on Nov 12 2020, 10:00 AM by Kelly Jacobson	100%	33.06%	4.84%	124		
Sent	MM Software Review Email_OctoberSurvey_20201105 Sent on Nov 5 2020, 10:00 AM by Kelly Jacobson	100%	46.55%	24.14%	58		
Sent	MM Software Review Email_SeptemberSurvey_20201020 Sent on Oct 20 2020, 9:00 AM by Kelly Jacobson	100%	35.53%	9.21%	76		
Sent	MM Software Review Email_SeptemberSurvey_20201012 Sent on Oct 12 2020, 9:00 AM by Kelly Jacobson	100%	40.24%	9.76%	82		
Sent	MM Software Review Email_SeptemberSurvey_202010						

Pipedrive

Pipedrive is a CRM solution for sales teams in small to medium-sized businesses. They host fairly sophisticated CRM tools on an uncomplicated interface—all at a decent price point.

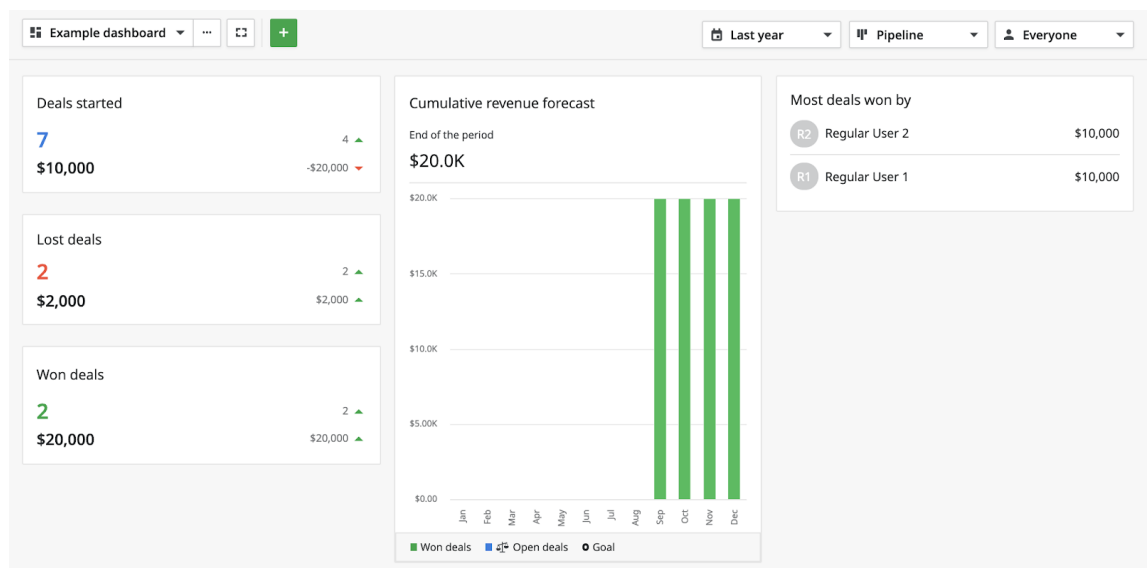
Fundamental features of the software include:

- Deal and contact management
- Data importing and exporting
- Customizable pipelines
- Meeting scheduling
- Reports for deals, sales activity, recurring revenue, and revenue forecast

Unfortunately, Pipedrive doesn't contain a form or landing page builder, which is a deal-breaker for some sales teams, as these tools efficiently capture leads.

If you're looking for an inexpensive and functional CRM software, Pipedrive is an excellent choice. In particular, businesses that are just starting with CRM software will benefit from its accessibility.

On the other hand, if your business wants to take advantage of marketing automation *and* CRM functions, they should look into a more all-inclusive tool.



Freshworks CRM

Freshworks provides user-friendly CRM solutions through their aptly titled suite: Freshworks CRM. Their software is meant to support and adapt to businesses as they grow.

This CRM platform is fairly comprehensive and incorporates the most essential sales features:

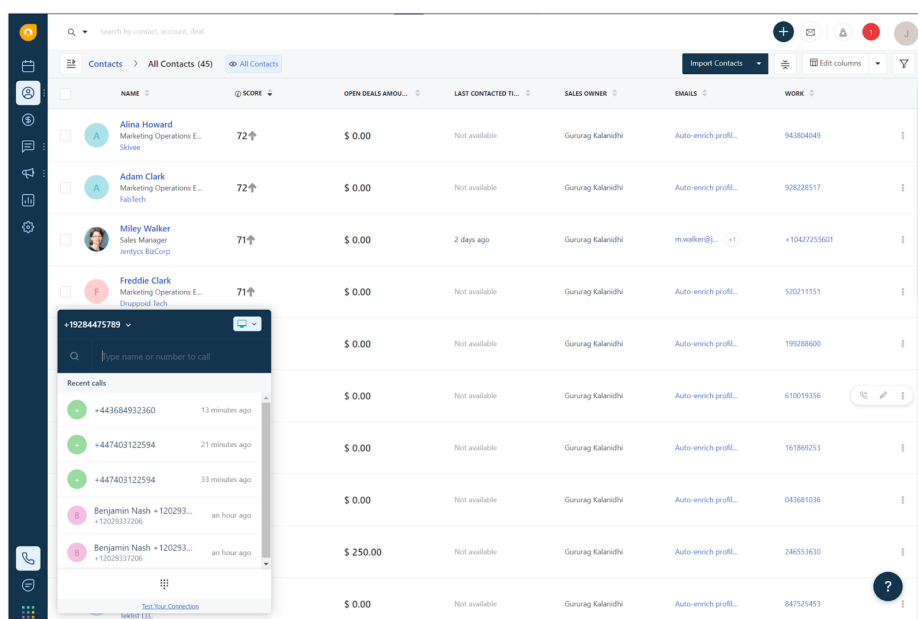
- Meeting scheduling
- Call log and interaction tracking
- Task management
- Automated workflows
- Contact management

Freshworks also provides basic marketing functions, such as list segmentation and form and email builders. Although, it does lack a landing page builder.

If you're a growing business with a limited contact list, Freshworks CRM is a great option. It's an ideal starter software, because it automates sales functions. This facilitates the process for sales teams who don't have much experience with CRMs.

Despite their reasonably inclusive plans, Freshworks lacks more complex features that bigger and more experienced sales teams need.

Additionally, they may not be the best for companies with large contact lists or those that require complex workflows.



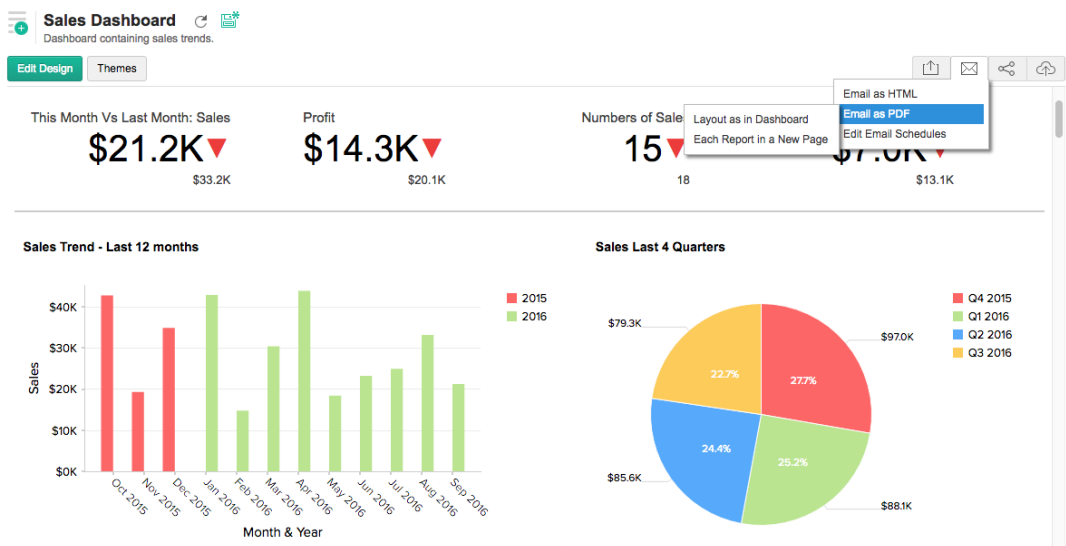
Zoho CRM

Zoho offers a suite of software to meet business needs, including HR, finance, workplace function, IT management, and digital asset creation. It also possesses adequate CRM functions through Zoho CRM:

- Lead deal and contact management
- Workflow automation
- Lead nurturing and customer journey orchestration
- Analytics report
- Predictive AI technology

The Sales Process Builder allows users to track sales processes and equip the CRM with company-specific processing rules. This makes reviewing sales data easy and efficient.

Zoho CRM is capable of handling both small and large business needs. However, Zoho lacks basic marketing services that are included in other softwares, so it's not ideal for companies seeking an all-in-one solution.



Conclusion

Ready to start leveraging the power that comes with a robust CRM software?

Make sure to keep these key takeaways in mind:

- Consider your budget, company size, and industry when looking into CRM platforms
- Confirm that your prospective CRM integrates with your existing email, landing page, or data storage software
- Choose the CRM that best suits your company's current and future needs, and remember that low price does not always mean low quality