CRM Buyers' Guide

How to find the right CRM software for your growing small business

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Finding the right CRM for your business

Choosing a software tool seems like it should be a simple business decision, but the truth is it's a choice that can carry a lot of emotional weight. Making the wrong decision can be costly not only financially, but also in terms of time and headaches.

You may be worrying about things like:

- What if we sign up for the software, then find out it doesn't have the features we need?
- What if we assume certain functionality is included in the subscription, but it costs extra and we go over budget?
- What if we pay too much and find out we could have gotten something better for less?
- What if it's hard to learn and we struggle to adopt it?
- What if my team ends up hating it?
- What if there's a disruption to our business during the transition and we lose customers and sales?
- What if we don't like the software we choose and end up having to do this all over again a year from now?

These possible pitfalls are real concerns, but they can be avoided if you're armed with the right information.

That's why we created this CRM Buyers' Guide — to give you a checklist of questions to ask and data to gather to help you make the decision that will serve your business for years to come.

Let's dive in.

What is a CRM?

CRM stands for “Customer Relationship Management” and is a software system that helps businesses stay organized and more easily nurture relationships with their prospects and customers.

A CRM keeps track of all communications and replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track customer data. With a CRM, your entire team can access lead and customer details at the right time to close a sale or deliver outstanding service.

Some modern CRMs also have the ability to not only store contact data, but also launch workflows and trigger communications to people in your CRM database. This is sales and marketing automation, and it should be an important aspect of your overall tech stack and decision to adopt a CRM. You should understand whether the tool you're purchasing can do both, or if you'll need to integrate or supplement with a separate automation tool.

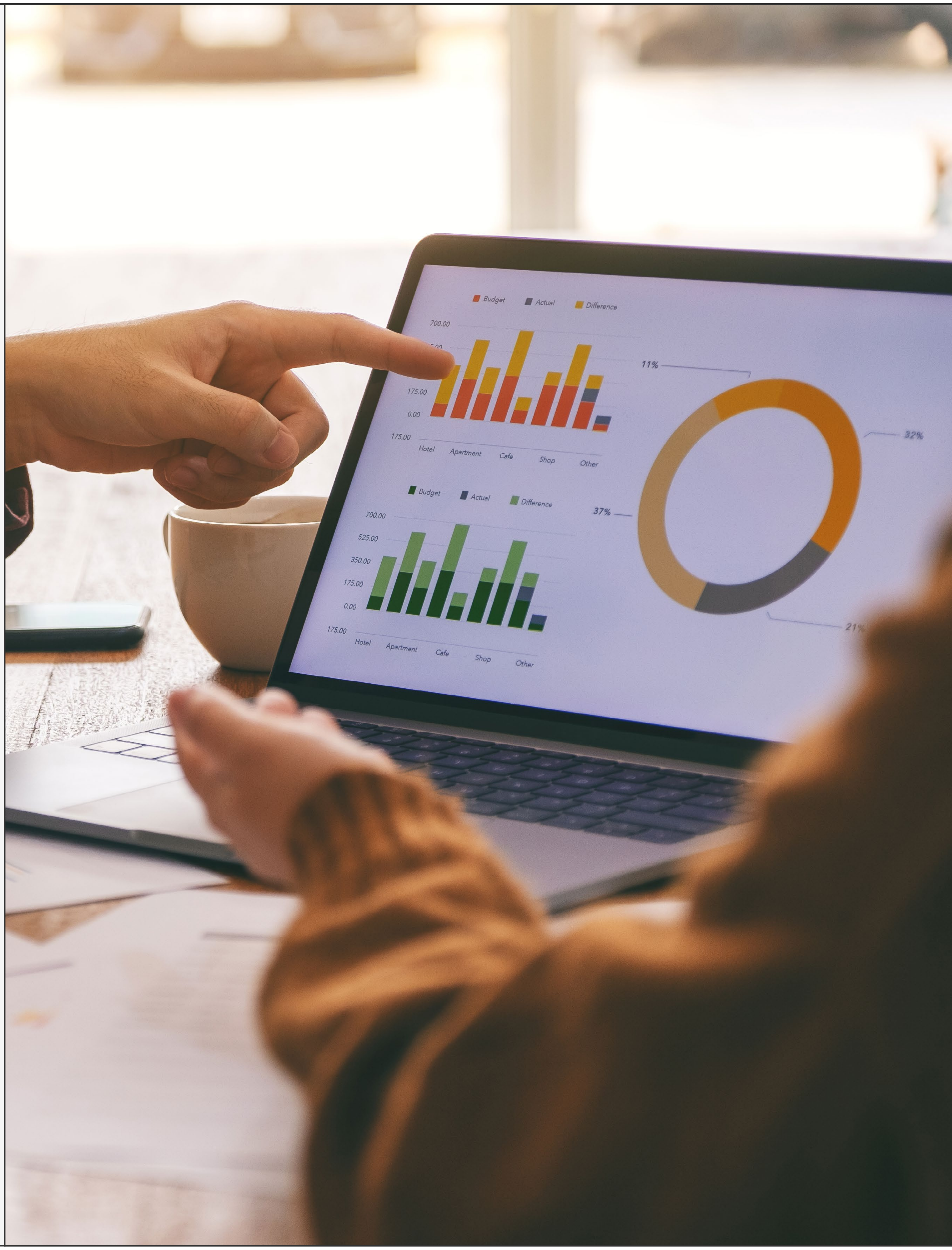
The result: organization, efficiency, better time management and impressed clients.

To learn more about what a CRM is and why it's critical to small business growth, check out our article, *What is a CRM?*

The benefits of using a CRM to grow your business

The right CRM can help your team attract and retain customers, execute marketing campaigns and save time along the way. You might say it's a powerful engine driving sales, marketing and customer service.

Here are just a few of the main ways a CRM with sales and marketing automation can benefit your business.



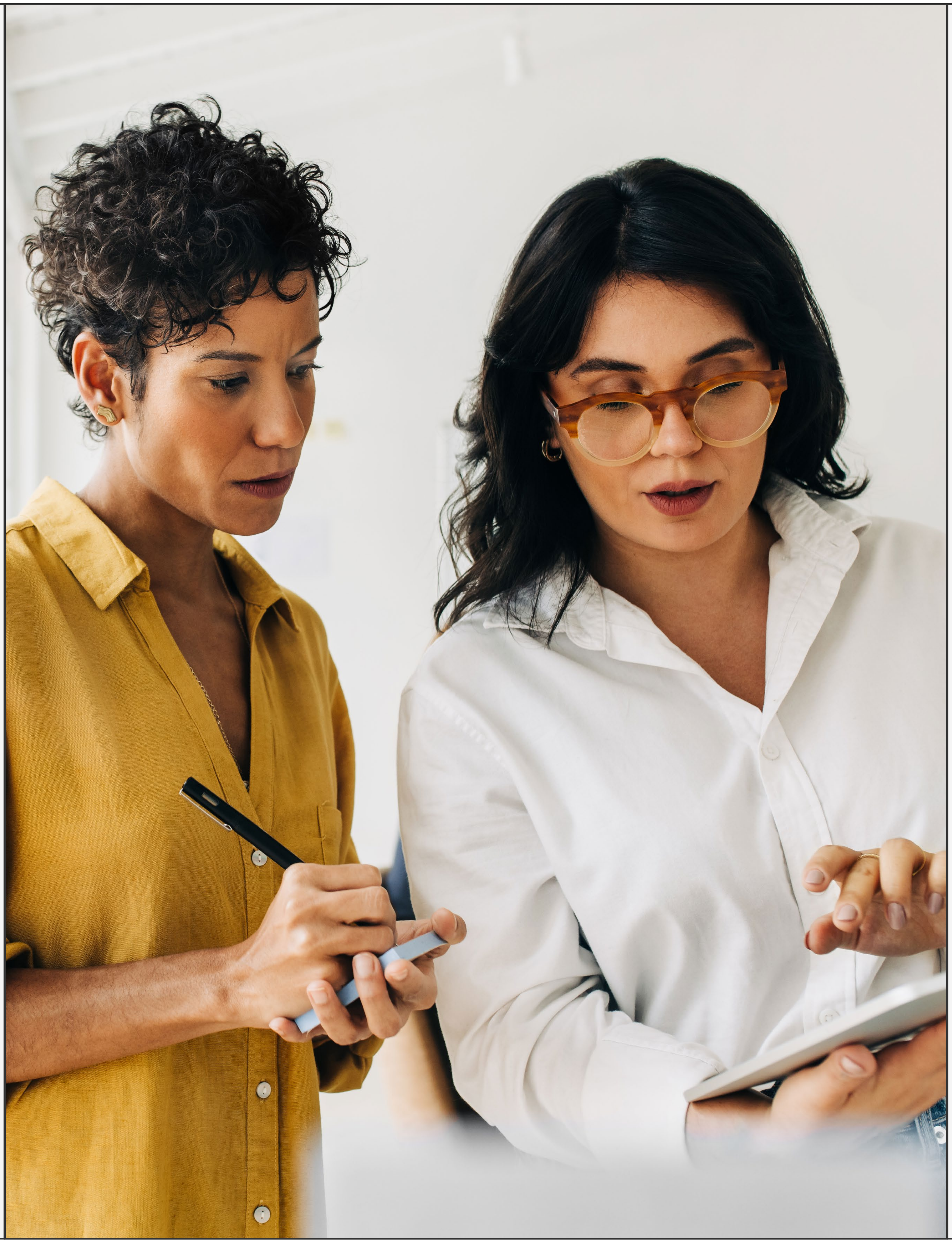
CENTRALIZE YOUR DATA

Get your entire team on the same page when it comes to your leads and customers. A CRM consolidates all of your data in one place, so your entire team can access the information they need, whenever and wherever they need it. With an in-depth view of each customer and lead at their fingertips, your team will have the power to close a sale or help a customer with an issue without spending hours piecing together insights from multiple sources.

UNDERSTAND YOUR CUSTOMERS BETTER

Ready for more effective, cost-efficient marketing campaigns? A CRM can give your team powerful segmentation abilities. By categorizing customers into segments based on your data about their behaviors, you can customize your messages, offers and content to resonate with each segment's preferences and interests.

A CRM also helps your team identify what's working and what needs improvement through lead conversion trends and customer purchasing patterns. For example, when you can see exactly where leads are dropping off, you can make adjustments to improve conversion. Or when your CRM reveals common purchase combinations, you can create cross-selling opportunities like packages to increase sales.



INCREASE CUSTOMER SATISFACTION

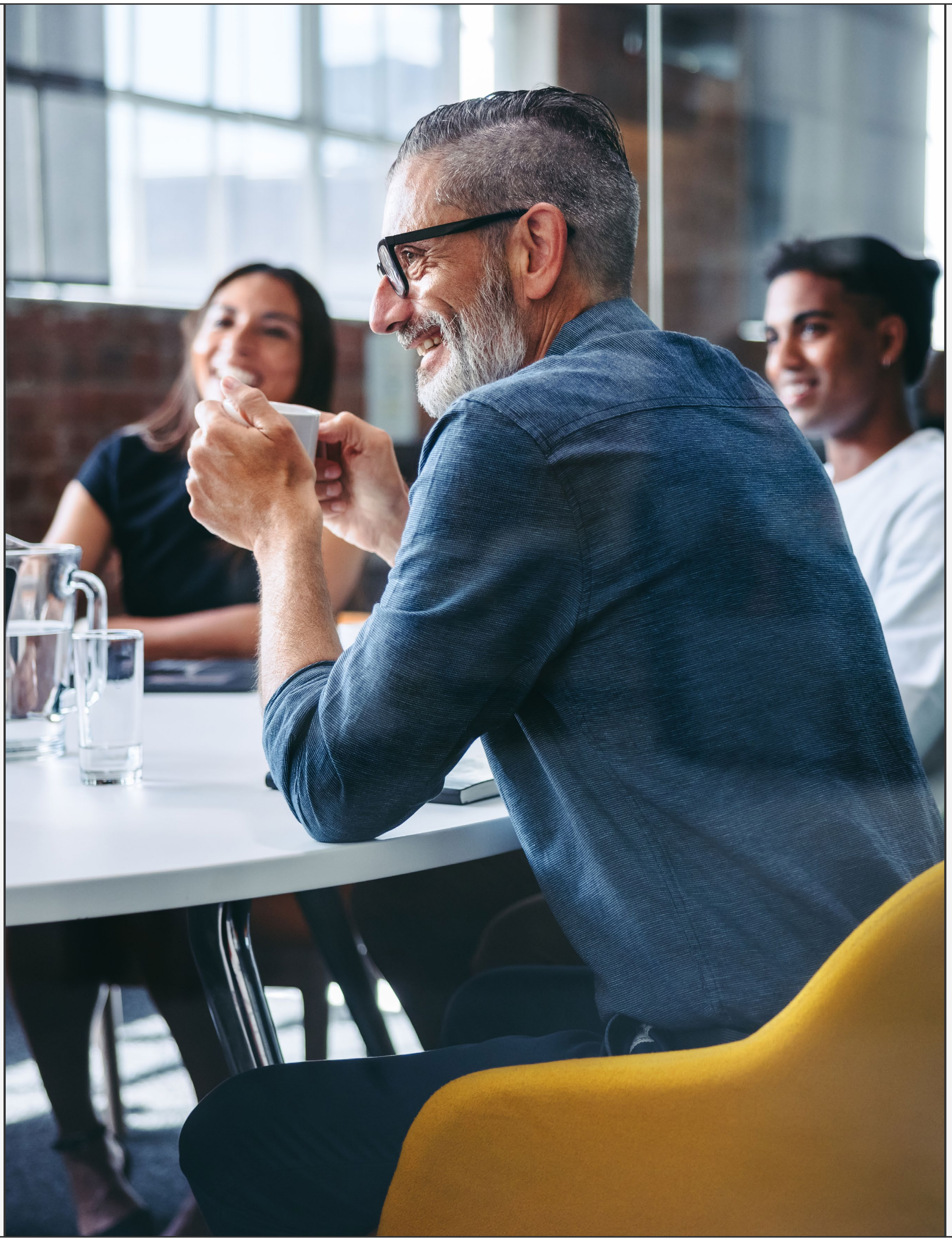
A CRM can ultimately lead to a better experience for your customers, turning them into fans of your business. When you choose a CRM with automation capabilities, it's easier for your team to strengthen customer relationships through timely, personalized communications. And strong relationships lead to customer retention, higher customer lifetime value, and referrals.

You can also solicit feedback to ensure you're creating the best possible customer experience. Automate a follow-up email or text message after each purchase, asking customers to rate their experience. By storing each customer's rating in your CRM, you can automatically create tasks for customer support to follow up with dissatisfied customers or send requests for reviews to happy customers.

STREAMLINE COMMUNICATION AND SAVE TIME

When your team can clearly see all the actions a customer or lead has taken, they gain a better understanding of the next steps to convert them. They're able to personalize their marketing efforts and sales conversations, helping your business avoid wasted ad dollars and time on the phone.

With CRM and sales and marketing automation software, emails and text messages can be personalized automatically based on a customer's interests, past purchases and time elapsed since their last purchase. This tailored messaging is critical for building long-lasting relationships with leads and clients.



SIMPLIFY YOUR SALES PIPELINE

The best CRMs not only give you a big-picture view of the status of every lead, but also help your sales team follow up to close more deals faster. In Keap, for example, users can stay on top of their pipeline with customizable lead dashboards, and trigger automated follow-up to nurture leads through the sales funnel.

Lead scoring is a huge benefit of a CRM, highlighting how hot or cold a lead is and prioritizing outreach efforts for your sales team. Based on rules you can customize, points are added to a lead record for key actions taken, like clicking a link or attending a webinar. Leads with the highest scores are pushed into sales rep pipelines for personalized communication.

The result? Less time wasted sifting through data and more deals closed.

Investing in a CRM powered by automation can pay dividends. According to self-reported results from customer surveys, Keap customers who use automation:

- Save 10 hours per week
- Increase revenue by 39%
- Increase lead volume by 53%

Check out our ROI calculator to see how automation can help grow your small business.

Is now the right time to buy?

Before exploring how to shop for a CRM, the first questions to ask are:

- Is this a critical need for my business right now?
- Are we ready to invest the time and effort to adopt this new technology?

Make sure you have a solid business case for why you need to get a CRM (or update an existing CRM) and why now is the right time. This will keep you grounded and motivated throughout the process.

One of the often overlooked benefits of switching software is that it's a great opportunity to evaluate your current business processes and look for ways to improve them as you build out the new system.

However, all of this takes time and effort. Look at the other priorities in your company right now and choose a timeline that allows you to give this project the attention it deserves.

Do you need a CRM?

If you don't already have a CRM, then it's important to make sure your business is truly at the stage where a CRM is essential. If you're just starting your business, you may actually be able to get by with other tools for a while until your business grows.

For example, Keap's CRM is best for entrepreneurs who have an established business and can commit the time to learn and implement Keap. Businesses that are ready for Keap typically have the following characteristics.

A digital presence and email: If you're a new business owner and still figuring out your business, then a CRM won't help you much at this stage. For now, focus on defining your offerings, your marketing plan, and getting customers. Turn to a CRM once you've built up a list of customers or established your digital marketing presence (website, offer and plan to drive people to that website) and you need to collect prospects' information with forms.

Growing contact list: A CRM helps you collect and manage contacts, so the best time to adopt one is when you have a lot of customers and need a better way to keep them organized than using spreadsheets and email. Until then, focus on building your contact list.

A proven business model: To get the most out of your investment in a CRM, you need a proven business model with a steady flow of leads and consistent sales. A CRM with automation, like Keap, can help you improve your existing sales conversion rates, but it can't multiply what isn't there to begin with.

Your unique situation may not fit exactly into the criteria above, but if your business is ready for a CRM then you should be able to say yes to most of these questions:

- ✔ Do I have a proven business model that gets results for customers?
- ✔ Do I have a reliable lead source?
- ✔ Do I have consistent sales?
- ✔ Do I have people working for me (employees and/or contractors)?
- ✔ Do I have hundreds of business contacts on my email list or a clear plan to get there?
- ✔ Does my team have time to devote to implementing a CRM platform?
- ✔ Can I invest a few hundred dollars a month in a CRM that makes my team more efficient and boosts sales?

Is it time to upgrade your CRM?

If you already have a CRM system, then the critical question for you is: Is now the time to upgrade? Switching comes at a cost, but there are potentially larger consequences to delaying necessary change. If you anticipate growth in the near future or if your current CRM struggles to handle your existing data, it may be time for an upgrade.

Likewise, if your team is struggling to adopt and use your existing CRM effectively, it may be worth exploring other options that are more intuitive, offer more support and are tailored to your team's needs. Many people adopt a CRM with big plans to use it, but resource and time constraints and/or lack of marketing expertise can prevent the team from applying it to drive growth.

As your business develops, your needs will change. Having a CRM that matches your needs today AND sets you up for more seamless growth in the future is critical.

Before you select a CRM provider, make sure to outline the following:

- Your primary growth and customer communication objectives
- Your business's key processes
- Repetitive tasks you'd like to automate to save time (e.g. sending follow-up emails, sending invoices, scheduling appointments, onboarding new customers or employees)

Features to look for when considering a switch:

1/7

Centralized customer and lead management

Your CRM should allow your entire organization to share customer and lead information seamlessly and make follow-up automatic. Failing to foster customer relationships leads to lost sales and damaged reputations. Plus, a disorganized approach to data management can cause your ideal leads to slip through the cracks. Having access to the information you need, the moment you need it can help your business close more sales, nurture more leads and build meaningful connections that lead to loyal customers.

2/7

Sales pipeline management

Your CRM should make it easy to track leads and move more of them through your funnel, saving your sales team time by automating repetitive processes and giving them more visibility into performance metrics.

With the right CRM, you should be able to score your leads, monitor their status, and set up corresponding notifications and tasks for your team. For example, in Keap, you can set up automatic reminders notifying sales reps to follow up on a cold lead; or when a sales rep sends a lead a proposal, you can trigger an automated email sequence that reminds the prospect to review it and offers to answer any questions or schedule a call.

3/7

Integration capabilities

There's no one ideal tech stack, as the tools you choose should address your business's unique priorities. But does your CRM help you avoid creating silos when your team eventually amasses a variety of tools for sales, marketing and more? If your current CRM lacks integration with critical applications or hinders data flow and communication, you might consider upgrading.

Your CRM should connect the apps your team needs to run your business and move data between them automatically. In Keap, for example, you can connect to over 4,000 apps with our Zapier integration. Once integrated, your third-party apps can trigger more effective (and creative) sales and marketing automations.

4/7

Workflow and marketing automation

With a CRM powered by sales and marketing automation, you can eliminate hours of repetitive tasks for your team and convert leads more effectively. The best CRMs allow you to build workflows with just a few clicks.

With Keap, you can use pre-built automations or create custom processes to automatically send text and email follow-ups to potential clients, take leads from contact form to appointment booked, assign tasks to team members based on specific customer actions, schedule appointment and invoice reminders, set up lead nurture sequences and more.

5/7

Ongoing education on how to get the most out of your CRM

A CRM takes time to master, and it's important that the platform you choose provides resources and education to help you make the most of all the tools available.

Keap is there for you every step of the way. Through Keap Academy, you'll have ongoing access to free courses and live training covering everything from automation features to growth strategies. Also discover a Keap community filled with other entrepreneurs and small business teams like yours — it's a great place to get questions answered by our most successful Keap users and find tips, best practices and product update information.

6/7

Support to get through implementation and troubleshooting

What does your team need to start strong with your new CRM, and what does the platform you're considering provide? A vendor's onboarding process can determine whether your team will ultimately be set up for success or frustration.

Keap subscriptions include up to 15 hours of free migration services, plus access to a dedicated Customer Success Manager who will help you achieve your unique business goals. You'll also get live, U.S.-based phone support, and 24/7 chat support right in your app.

And if you need additional support as you get started, help is available through one-on-one onboarding coaching with our small business growth experts, as well as our done-for-you services. You'll also have access to a strong network of Keap Certified Partners should you need to hire a Keap expert for marketing or automation services.

7/7

Content creation features

Organizing customer data and communications is the foundation of a CRM platform, but an upgraded system should go beyond the essentials. Did you know some CRM platforms include features that can even make the process of creating content faster and more convenient?

CRMs like Keap provide pre-built templates, drag-and-drop editors and automation features to streamline the content and campaign creation process.

Keap also has a built-in AI content generator that writes copy for landing pages, customer follow-up emails and texts, email marketing campaigns and more. Choose from one of the templates Keap has developed over 20+ years of working with small businesses, add a little information about your business, and Content Assistant will create a campaign you can launch in minutes.

Questions to consider

- Am I missing opportunities to communicate with prospects and customers? Why? And how?
- How has my current CRM made my team's work harder?
- Do I have a defined customer journey?
- Do I have defined processes for employees to move customers through key stages of their journey? Are these processes automated?
- What kinds of insights about my customers would help my business grow?
- How can I improve my team's processes for a better customer experience? And to use my team's time more effectively?
- What information do I wish I could capture about my leads and customers?
- Which applications does my team use, and do I want to integrate my CRM with those tools?
- Which marketing channels are most important to me (SMS, email, app, etc.)? Does my CRM make it easier to reach my target customers via these channels?
- Does the pricing model for my CRM limit our usage of it? (i.e. You're being charged too much to use the features you want and need)
- How much of the creation of our marketing materials and processes do we have time to do regularly, and where do we need additional support?

How to evaluate CRM software options

Each section below breaks down the major categories of things to look for in a CRM system.

Basic CRM requirements

Most CRM systems base their pricing on the number of contacts and users. If the CRM also includes email, then pricing may also vary depending on the volume of emails sent.

Find out your current — and future — needs for:

- Number of contacts
- Number of users
- Number of emails sent per month

It's important to take future growth into account when looking at CRM pricing. If your current needs are close to the threshold between one price tier and the next, then find out:

- In what increments can I add more contacts, and how much extra will they cost?
- If I bring on more team members, how much is it to add users?
- If I were to double (or triple, etc.) the number of emails I send, how much extra would that cost?

Additional features and integrations

Many CRM software systems offer other features such as:

- Email broadcasting
- Sales and marketing automation
- Text messaging
- Sales pipeline organization
- Forms and landing pages
- Quotes, invoicing and payments
- Appointment management
- Business phone number
- Reporting
- Pre-built campaigns and automations
- AI content creation

Take these additional services into consideration, and ask:

- Can I cancel my subscription to other technology tools by using what's included in this CRM?
- How easy is it to get this CRM to connect with other software tools I use?

Migration, training and implementation

The cost of the software itself is only part of the investment you'll make in your CRM system. There's also a switching cost — the time and money it takes to move your current content and processes into the new system.

TEAM BUY-IN AND TRAINING

It's important to get all the right stakeholders on your team involved so that they can:

- Give input on how the change will affect them
- Explain what they need from the new system
- Get clarity on what their role will be in transitioning

One of the benefits of a good CRM is that it allows your team members to collaborate and share information more easily. Instead of presenting this to your team as a chore everyone has to put up with, sell it as an opportunity to reduce manual data entry, have better access to prospect and customer data, and improve efficiency for everyone.

As you consider various CRM options, assess the learning curve for each one, and ask:

- How easy/difficult is this software to learn and use?
- What kind of training and support will my team need?
- What level of training does the CRM company offer, and is it live or on-demand?
- Does the company offer coaching and access to product experts?
- What kind of customer support is available — Phone? Chat? Email? — and does it cost extra?

Once you select a CRM system, set usage goals for your team, including taking advantage of courses and spending time in the software learning how it works. Do not allow resistant team members to continue using old or alternate methods. The biggest advantage of a CRM is having all your data in one place — so the moment people start using concurrent systems for the same thing, the value of your investment in the CRM system is diluted.

MIGRATION AND DATA IMPORT

You'll need to move your current customer and prospect data into the new system. It sounds easy, but it can be very technical and time-consuming. Assign a detail-oriented person on your team to be in charge of the migration.

Check to see if the software you're considering offers migration and data import services, and look at the cost for each. Some common transition processes to consider are:

- Exporting contacts from the old system and importing them into the new system
- Copying over campaign content like email copy, landing pages, and forms
- Entering products and services and securely transitioning credit card data (if you're going to use the CRM system to take payments)
- Recreating automations (if you have them in your current system)
- Connecting your other software tools with the new CRM

Some CRM vendors will provide a certain amount of free migration services when you sign up as a new customer. For example, Keap offers 15 hours of free migration services and provides advanced data import services at affordable prices.

Growth flexibility

So far, you've probably spent a lot of time thinking about what you need in a CRM now. But what about in the next five years or so? Like buying a child's shoes with some room in the toe, thinking about your future needs helps you choose a CRM that will grow with your business.

Because, let's face it, you don't want to go through this process again anytime soon.

When planning for the future, consider both capacity and cost.

- Does the platform have the features I'll need in the future, even if I'm not quite ready for them now?
- How much will the cost expand as our usage of the platform expands in terms of:
  - Contact/email list size
  - Users
  - Email volume
- Can the system easily integrate with other software tools that I may use in the future?

Also look at the companies and their history as a way to predict their future performance.

- Do they often release new features and provide regular updates to the software?
- Do they innovate as the technology and marketing landscape changes?

Hidden costs and contract terms

Sometimes everything looks good on the surface, but when you dig deeper, you may discover additional costs you weren't expecting, or unfavorable contract terms.

Here's a list of things to consider so you can avoid a pricing nightmare after you've pulled the trigger on a new CRM.

- Are the features in a product tier fully unlocked, or do I have to upgrade to get the level of functionality I need?
- What add-ons are available, and what do they cost?
- Is there a contract? What are the terms? How do I break it if I'm unsatisfied?
- Is there a price discount for an annual prepay?

These are some of the most common places CRM companies can hide costs:

Cheaper modules that add up to big amounts: Some companies have pricing based on "hubs" that include separate products for CRM, sales pipeline, and marketing automation capabilities. When you bundle them together, pricing goes up. Look for clear pricing and a solution meant for businesses of your size.

Mandatory paid onboarding: While you should definitely expect a cost for getting started with a new platform, some CRM platforms require you to purchase their coaching, consulting, or migration services to the tune of thousands of dollars. So be sure to ask about implementation and onboarding costs up front.

Low cost of entry, high cost for add-ons: Sometimes the base price of a product is affordable, but adding on contacts, users, and email volume gets pricey fast. This is why it's important to investigate how pricing may increase as your business grows.

A new CRM system is an investment in your business. Research upfront exactly what that investment will be so you don't get sticker shock after you've signed on the dotted line.

Narrow your options by business stage

There are a lot of CRM tools to choose from, so it helps to narrow your search to platforms built for the stage of business you're in now and expect to grow into in the next 3-5 years.

For example, Keap is built especially for small businesses, and is ideal for businesses in stages three through five in the **6 Stages of Small Business Growth.**

STAGE	1 & 2 Solopreneur		3	4	5	6
	Side hustle	Self-employed	New Employer	Steady Operation	7-Figure Business	Growth Company
Typical number of employees	1	1	2-3	4-10	11-20	21-100
Typical sales range	$0-3K /month	$3-10K /month	$100-300K	$300K-1M	$1-3M	$3-10M
# in the U.S.	18.4M	6.2M	1.8M	2M	750K	450K
Team size	Owner	Owner + Contractor(s)	Partner or assistant	One team	Multiple teams & leaders	Management team
Growth phase	Launching		Growing	Accelerating	Scaling	Mastering
Biggest hurdle	Time	Leads	Sales	Marketing	People & Systems	Leadership
Keys to success	Mindset, Vision & Rhythm		Strategy & Automation		Leadership	

Smaller businesses that are still in the Solopreneur stage may or may not have enough contacts, sales and processes to take advantage of all the benefits of a CRM with automation, like Keap. Businesses just starting out may be better served with software options like Google and Mailchimp that provide more limited functionality but cost less to get started.

However, there are two types of smaller businesses that may still benefit from CRM and automation:

- Established solopreneurs who want to grow their income and focus more on working with clients, without having to hire more people
- Startups that plan to grow quickly and don't want to deal with the hassle of switching from low-cost software when business takes off

Businesses in the Growth Company stage that are on their way to becoming an enterprise-level business may need more features than Keap can provide. If that describes your business, you may want to narrow your search to enterprise-level software like Salesforce.

Evaluate the best CRM for growing small businesses

In this guide, we've given you a list of things to look for when evaluating CRM software. To make things easy for you, we've compiled the answers to all those questions — about Keap — right here.

Basic CRM requirements of Keap

Keap has three product tiers, with discounted pricing for annual prepaid plans.

1. **Pro** — Includes 1,500 contacts and 2 users
2. **Max** — Includes 2,500 contacts and 3 users
3. **Max Classic** — For advanced marketing and sales team needs. Chat with our sales team for contact and user details.

If you'd like to add more users or contacts, there is an additional monthly or annual charge. See our pricing page for up-to-date numbers and current product details.

Additional features of Keap

In addition to a CRM, Keap Pro includes:

- Email marketing — 1:1, broadcast, and automated emails
- Sales & marketing automation
- Automated lead capture & follow-up
- Appointments
- Sales pipeline
- Quotes and invoices
- Payments — Credit, debit, and ACH
- Landing pages & online sales
- Dedicated phone line (US & Canada)*
- Text marketing — 1:1, broadcast, and automated text messages*
- AI-assisted content creation & pre-built campaigns

Max and Max Classic have additional features not listed above. Please see the pricing page or talk to your sales representative for a complete list of features by product edition.

*Keap Pro includes a 3-month trial of voice and text (Tier 1), then charges at a per-month rate. See the text marketing pricing tiers for more details — you can find it under the Text Marketing FAQ on the pricing page.

Migration, training and implementation

COACHING

Keap offers — but does not require — onboarding coaching. We highly recommend coaching because it can make a big difference in getting your team up and running in Keap quickly. In fact, that's why we guarantee results in 90 days with our Let's Grow Guarantee. See the coaching page for more details and pricing.

FREE TRAINING

Learning CRM and automation software takes work, but we make it as easy as possible with free education from Keap Academy. Choose from on-demand courses you can watch at your own pace, or join one of our live trainings.

DONE-FOR-YOU SERVICES

If your team doesn't have the time or expertise to move your data and assets into Keap or build out new campaigns, no problem — our experts can handle that for you. Learn about our free migration, advanced data import services, and Done-For-You services on our Pro Services page.

KEAP CERTIFIED PARTNER EXPERTS

Over the past 20 years, we've grown a robust ecosystem of certified Keap experts who offer their own specialized services to Keap customers. Browse the Keap Marketplace to find automation experts, designers, developers and more.

CUSTOMER SUPPORT

At Keap, getting a customer service rep on the phone is just as easy as contacting a sales rep. No long wait times. No complicated phone trees (press 1 for sales, 2 for support — that's it). And our customer support team is based right here at the Keap Headquarters in Chandler, AZ. You also get 24/7 chat support right from inside your Keap app.

And it's all included as part of your regular Keap subscription.

Growth flexibility

Over 20 years ago, when our company was founded, sales and marketing automation didn't exist. That's because we invented it. We also created Lifecycle Automation — formerly known as Lifecycle Marketing — which is now used the world over as a framework for creating and automating outstanding customer experiences and growing conversions, retention and repeat sales. We were developing an in-app, AI-powered Content Assistant a year before ChatGPT took the world by storm.

What does this mean for you? Simply put, Keap was founded on innovation, and our dedication to continuous improvement means you can count on us to deliver a consistently excellent product experience.

Product updates are released monthly. We're constantly listening to customer feedback for ideas on how to improve the software even further.

Keap connects easily to Zapier, giving access to hundreds of other app connections, and supports custom developer apps. Check out our integrations page for more details.

Additional costs

With Keap, all additional costs are optional. If something is required, it's part of the basic subscription price.

Pricing for phone line and text messaging can also be found on the pricing page, in the FAQ section. You'll also see pricing for a local phone number if you'd prefer that over a toll-free number.

Let's Grow Coaching comes with a 90-day Let's Grow Guarantee. Find pricing on the onboarding coaching page.

Contract terms

For the latest contract, please talk to your Keap sales representative by calling +1 866-800-0004.

You can save hundreds of dollars per year on your Keap subscription by pre-paying annually. The discount applies to the base price as well as additional contacts and users.

We hope this guide has helped simplify your search for a CRM. Ready to give Keap a try? Sign up for our free trial.

Remember: Your goals are our goals, so let us know how we can help you make a decision you feel good about.