Customer relationship management (CRM) is a data-based approach that businesses use to improve customer retention, loyalty, and profitability. Most large enterprises adopted CRM years ago for a very simple reason: It works. Research shows that ROI on a properly integrated CRM solution can range from about $2.50 to $5.60 on every dollar invested. CRM can drive significant increases in lead conversion and revenue generation, and it can improve customer service by as much as 50 percent.

Yet, while surveys have found that most small and midsize businesses (SMBs) are aware of CRM's potential benefits, only about a quarter of them have adopted it. One reason may be a lack of understanding about what CRM really is, says Joseph See, chief information officer at Pepperdine University. “CRM is not a technology strategy. It is entirely and solely a business strategy.”

SMBs may also be concerned about the time and effort required to implement a CRM solution and how quickly ROI can be achieved. “SMBs are businesses that behave like consumers,” says Bastin Gerald, founder of Apptivo, a developer and provider of CRM and related solutions. “They don’t have a lot of patience. Everyone wants instant gratification.”

However, the latest generation of cloud-based and mobile-friendly CRM solutions should help allay those concerns. And with their ability to integrate multiple performance-boosting applications, they have more to offer SMBs than ever before.

Acquiring and retaining customers is the key to success for SMBs, and they need a system that enables them to create a repeatable process to manage all the interactions they have with their customers, from simple questions about product features to complaints and invoice inquiries. “If you have a holistic view about your customer at the micro level and are...
FOCUSING ON THE ATTRIBUTES BELOW THAT ARE MOST RELEVANT TO YOUR NEEDS CAN MAKE THE DECISION EASIER

1. **COMMUNITY/MARKET SIGNALS**
   A high ranking on review sites and a solid user community that raves about a product are very good signs.

2. **USABILITY/QUICK START-UP**
   Look for solutions that are easy to visualize, understand, and navigate, and that have key features and commands that are easy to remember.

3. **SUPPORT**
   Multichannel is key, especially when just starting out with a CRM. Look for phone, email, and chat support with good, easy-to-find documentation and how-to videos.

4. **ADAPTABILITY**
   The CRM solution you choose should be customizable with minimal investment of time and money and adaptable to changing business conditions, allowing you to reconfigure as you grow.

5. **SCALABILITY**
   Selecting something that is “future-proof” can save you the pain of having to switch products as you grow.

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**CRMs provide to your sales activities allows you to capture business that you would otherwise have lost,” Malcoun says. Business needs vary across the board, of course, and it’s important to match those needs to the CRM solution you choose. “No one should be embarrassed about using Excel as their CRM,” says Nate Kontny, CEO of Highrise, a CRM application for managing leads and follow-ups. “Too many companies seem to want to scare SMBs into their tools. Don’t feel rushed to change, but when you do, try to find the solution that fits your specific place in the world.”

Highrise is designed for businesses that “need a system right this second to help track leads and manage follow-ups,” Kontny adds. “That’s our advantage for a specific customer—someone who needs simple, streamlined, straightforward, and instant.”

For SMBs looking for more sophisticated capabilities, CRM solutions moving in the direction of customer engagement management, or CEM, have a lot to offer. “CEM is a new theme that has emerged and is being talked about in the large-enterprise segment over the last four or five quarters,” Gerald reports. It may be relevant for SMBs as well, since the main idea is to bring all interactions together under a single umbrella. With more than 50 apps, Apptrivo is able to provide a CEM platform for SMBs, he says. “We have an invoice portal for customers to log-in and check their invoices and other such features, all of which will ensure that our customers stay future-proof.”

The new cloud-based and mobile-optimized CRM solutions offer more benefits and are easier to implement and use than anything that has come before, but reaping all CRM’s benefits requires effort on the SMBs part. “Implementing excellent CRM is a complex, complicated process that requires keeping track of a lot of moving parts,” cautions Andrew Friedenthal, CRM market researcher at online technology consultancy Software Advice. While CRM can certainly help SMBs, they also need a plan to make sure the solution they choose will create a solid CRM framework that will support their business efforts, he stresses.

Fortunately, that is getting easier to do as the CRM software market continues to diversify, creating more opportunities for businesses to find the perfect fit. “With affordable pricing, industry-specialized systems and access to the basic salesforce automation systems that are required for businesses to operate today, CRM is more attractive and available to SMBs than ever before,” Friedenthal says. “A company-wide CRM is, in many instances, the most useful tool for enacting a cultural shift that will ultimately reap rewards in the marketplace.”

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