



# SMBs **NEED** CRM TO LEVEL THE PLAYING FIELD

**Not using CRM? Most of your competitors are.  
Here's what you're missing out on—but can easily get.**

Small to midsize businesses (SMBs) that aren't using a customer relationship management (CRM) solution are missing an opportunity to become more efficient, productive, and profitable. Worse, they are losing ground to competitors. In a recent Gartner survey, 56 percent of SMBs said they are already using CRM. By relying on archaic methods like spreadsheets to keep track of customer data and interactions, SMBs are missing out on three big advantages, says Rodrigo Vaca, vice president of marketing for CRM at Zoho. "First is the ability to keep everyone in the organization on the

same page about what's going on in the business. Second, CRM is unbeatable when it comes to keeping you on track and updating you. It can remind you of anything from a client's birthday to a proposal you need to follow up on. Third, it's a fantastic tool for keeping a system of record, which is just a fancy term for tracking things like customer purchase histories, promises made, and how well you delivered on those promises. Nothing falls through the cracks."

CRM keeps all customer interactions in a single place and makes that information

accessible to everyone who needs it. "Companies can better manage which current and prospective customers to call and when to call them," says George Singos, business leader advisor at the Michigan Manufacturing Technology Center. "Missing one follow-up meeting or failing to keep track of a customer's sales cycle can be costly, and CRM can resolve those issues."

## OVERCOMING A BAD REPUTATION

Studies show high awareness levels of CRM among SMBs, yet almost half still don't use it. Vaca says one stumbling block is that the technology has made a bad name for itself. "It's got a reputation for being expensive, difficult to deploy, hard to use, and overloaded with unneeded features. That may have been true in the past, but it's not anymore—and it's certainly not the case with Zoho CRM," he says.

SMBs considering CRM should look for five things in a solution, Vaca advises: ease of deployment, no or low risk (no contract required), fast and mobile-ready, compatible with your business model, and easily scalable.

"Ease of use is a big competitive differentiator for Zoho," Vaca says. "We know if you don't use your CRM, there is no way you can reap all the benefits it provides." There is a free version of Zoho CRM for up to three users, and paid versions are all available for a 15-day free trial, with no credit card required. Paid versions are also contract-free. Zoho integrates with all types of B2C and B2B business models, from e-commerce to face-to-face.

"We believe that to be successful in business you not only have to work hard, you have to work smart, and that's what Zoho CRM is designed to do," Vaca says. "It's designed to help businesses sell smarter, better, and faster." ■

# There is nothing small about a business that sells big.

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