

CRM

Buyer's Guide

A Complete Guide to Top Software
for Sales, Marketing, and Service

Brought to you by:

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What Is CRM Software?

Customer Relationship Management (CRM) software is a type of business application that helps sales, marketing, and customer service teams collaborate to attract new prospects and convert them into long-term customers.

CRM software helps you manage customer experiences and access up-to-the-minute customer data. Working from the same information, your sales, marketing, and customer service teams can coordinate efforts, monitor engagement through every stage of the sales cycle, maintain accurate customer records, and ensure no opportunity falls through the cracks.

Investing in a CRM helps you:

Improve...

- Response time to customer inquiries
- Customer communication and retention
- Productivity and collaboration across teams

Reduce...

- The length of the lead conversion cycle
- Manual paperwork and time spent on administrative tasks
- Bottlenecks in the sales funnel

Manage...

- Lead qualification
- Customer relationships and data
- Support tickets and other queries



Types of CRM

Different CRMs are designed for different business sizes, budgets, and structures. Most CRMs can be categorized as freemium, mid-market, enterprise-level, or suite.

Freemium CRMs

Perfect for small companies just getting started with sales, marketing, and service software.

Small businesses often lack the budget for large-scale CRM implementations, so CRM developers like HubSpot, Zoho, and Monday.com offer freemium options for businesses. These freemium CRMs typically include basic features for sales, marketing, and customer service teams to coordinate efforts, monitor engagement, maintain accurate customer records, and prevent opportunities from falling through the cracks. However, more robust functionality is often locked behind payment plans.

Benefits:

- Low (or no) cost of entry
- Basic features immediately available
- Quick and easy to set up

Drawbacks:

- Advanced features require paid subscriptions
- Limited support compared to paid versions
- Fewer integration opportunities

Mid-Market CRMs

Perfect for fast-growing companies with specific sales, marketing, and service needs.

As small businesses grow, they often come to a junction point where small-scale freemium software just doesn't cut it anymore. Mid-market CRMs are ideal for small and mid-sized companies that require collaboration across teams and flexible software that will grow alongside them. HubSpot is one of the top choices for marketing-focused companies, while the Dynamics 365 CRM platform is perfect for companies that already use Microsoft solutions.

Benefits:

- Include integration options to customize tech stacks
- Offer robust features at a reasonable price
- Designed to keep pace with growing organizations

Drawbacks:

- May lack multi-entity or global business features
- Less customizable than large-scale software
- Out of budget for small businesses with tighter financials





Enterprise CRMs

Perfect for large companies with multiple offices that need to connect sales, marketing, and service teams across the globe.

Large companies with multiple offices spread across wide geographic areas need CRM software that keeps everyone connected. Salesforce and SAP offer large-scale CRM solutions to help national and international teams juggle the sales pipelines, marketing campaigns, and customer support. Alternatively, solutions from HubSpot and Microsoft can scale as mid-market companies grow into larger enterprises. These CRMs make data management a breeze with powerful database features that ensure no customer is left behind.

Benefits:

- Designed to centralize sales, marketing, and service operations
- Highly customizable modules and integrations
- Advanced organization for even the largest data warehouses

Drawbacks:

- High cost of entry
- Complex customizations can extend the implementation process
- Steeper learning curve due to breadth and depth of features

CRM and ERP Suite

Perfect for companies that want one solution for sales, marketing, service, and operations.

If you want an all-in-one tool that centralizes sales, marketing, service, and operations, you could invest in a CRM and ERP suite. These are large-scale solutions from developers that bring together all your business data from across multiple platforms. While these suites are complex to set up and customize, they can be worthwhile for companies that value deep, real-time data insights.

Benefits:

- Designed to centralize sales, marketing, customer service, finance, and operations
- Accessible across the entire organization
- Powerful workflows and automations for multi-step processes

Drawbacks:

- High cost of entry
- May require integrations for deep, specialized features
- Steeper learning curve due to breadth and depth of features

What to Look for in a New CRM

In general, most CRM solutions offer the same basic features:

- General: Data management, automation, and reports and dashboards
- Sales: Lead tracking, forecasting, and account management
- Marketing: Lead scoring and conversion, campaign automation, and messaging personalization
- Service: Ticket routing, self-service tools, and automated chatbots

Instead of scrutinizing the features available in a CRM, focus on the differentiators that are most meaningful to your business, such as:

- Industry Functionality: What unique features or regulations should the software include?
- Existing Software: What tools do you already use that the CRM should integrate with?
- Customization Needs: Will you be fine with out-of-the-box features, or do you require extensive tailoring?
- Budget: What is a comfortable range for your monthly subscription cost?



What to Look for in an Implementation Partner

No matter what CRM you select, your implementation partner will be a long-term collaborator whenever you need customization, support, or new integrations. Selecting the right partner is just as crucial as selecting the right software.

When looking for a CRM implementation partner, run through the following questions to ensure you're making the best long-term decision:

- Does this partner listen to and understand our unique business needs?
- Does this partner have a high success rate of CRM implementations?
- Does this partner have concrete examples of customer success stories?
- Does this partner offer fair, competitive pricing for our basic and advanced software needs?
- Does this partner know about our desired CRM and the business software space?
- Does this partner offer long-term, personalized support?
- Will this partner be there for me whenever I need them?



How Much Does a CRM Cost?

Every CRM is priced differently, and software providers may offer different licensing tiers based on prepackaged features. Estimating your expected CRM cost becomes more complicated when you add in other considerations like user count, add-on features, customizations, and integrations. However, there are a few rules of thumb that apply to pricing for most CRMs.

Typically, sales and service modules are priced per user, while marketing modules are priced based on the number of required contacts. If you're implementing a cloud CRM, you're likely investing in a SaaS, or "software as a service," model. SaaS subscriptions are paid monthly, though some providers offer a discount for companies that make annual payments instead.

If you want more details on pricing, including a cost estimate for your designed CRM, you can find Microsoft, Salesforce, and HubSpot below:

[Microsoft Calculator](#)

[Salesforce Calculator](#)

[HubSpot Calculator](#)



Next Steps

If you're looking for a CRM partner that checks all the boxes, why not consider Cargas? We've been in the software business for 35+ years and have helped 99% of our customers successfully implement CRM solutions from Microsoft, Salesforce, and HubSpot. Plus, we also offer ERP solutions from Microsoft, Sage, and Acumatica; our own proprietary software for fuel delivery and HVAC service; and custom development options to tailor your software to your unique needs.

If you're curious about Cargas' strategy for implementing and supporting CRM software, reach out today for a no-obligation chat. We'll evaluate your business needs and processes to determine the best path forward.

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