

CRM Software Comparison Guide 2022

Make better informed decisions on
your CRM software with YourShortlist

YourShortlist 





About this Guide

When you're searching for suitable Customer Relationship Management (CRM) software for your business, it can be difficult to gather and compare all the suitable options on the market to find which system best meets your requirements.

This CRM comparison guide explores the different deployment models and options for businesses of all sizes. We've also included a helpful table comparing some of the top CRM solutions on the market and their available features.

All of this is to help you, the buyer, understand the market and save time and money on finding and implementing the best possible CRM system for your business.



If you want to compare solutions right away, head to Page 7 for our CRM comparison table!

Shorty's Shortcut:





About YourShortlist

YourShortlist helps make CRM procurement simpler, faster, and more cost-effective for buyers at every stage of the process.

Our team of consultants helps match buyers with their ideal software provider, creating bespoke shortlists from our diverse database of 2000+ trusted partners.

Whether you're actively searching for a new CRM solution, dissatisfied with your current software, or simply looking for an alternative to your current customer management system, we can help guide you in the right direction.

Our advice, your decision.





What is Customer Relationship Management?

CRM is the principle of managing your customer information database and communications with the intent of nurturing contacts throughout the buyer's journey and towards brand advocacy.

Fundamentally, CRM is about providing you with insights into how your company interacts with prospects, leads, and customers and is applicable to customer service, marketing, and sales departments in many industries, from retail and hospitality to technology and manufacturing.

It enables you to close sales quicker, address customer feedback, and enhance brand loyalty, integrating with other project management and business management systems to support overall business growth.

CRM Software

CRM solutions are a class of software that allows companies of all sizes to consolidate customer contact information into a single hub for data management, communication, and analysis.

CRM software provides a unified interface for managing and tracking customer-facing interactions across your business. It often integrates with other business software and processes such as Enterprise Resource Planning (ERP), email marketing, and more. Importantly, CRM software provides analytics and reporting that goes beyond what a simple database or communications tool can offer.

When looking to deploy a CRM solution, you will likely require software that integrates:

- **Email Marketing** – track, manage, and contact your email subscribers with targeted marketing campaigns.
- **Social Media** – CRM social integration can include reviews, comments, and instant messaging apps.
- **ERP** – track finances and resources across sales, supply chain, and distribution. Integration with CRM allows for a more connected overview of customers and their orders progressing through your sales pipeline.
- **Live Chat & Instant Messaging Functions**
- **Reporting & Analytics**



Categories of CRM Solution

While there are many types of CRM systems out there, most will fall into one of three styles of setup with different advantages and disadvantages.

Operational Solutions

One of the most common applications of CRM is to better facilitate business operations, specifically those relating to your current and potential customers. The three core areas of sales, marketing, and customer service are made easier to manage through streamlined automation and ‘self-serve’ functions. This type of solution is all about delivering a great end-to-end customer experience and seamless interaction between core, customer-centric business operations.

Analytical Solutions

The main purpose of a CRM system is to provide a single source of customer data. This means many solutions are geared around collection, management, tracking, and analysis of said data for the purposes of enabling lead generation and wider business growth. In addition to storing and sorting customer data, analytical solutions provide insights on which leads, channels, and CRM processes are successful, and which require optimisation.

Collaborative Solutions

Also known as strategic CRM systems, this class of solutions is aimed at improving communication and collaboration between your teams. While the goal of improved customer experience remains the same as an operational solution, collaborative solutions achieve this by sharing key information across your organisation and improving how interactions, channels, and documents are managed. This can also extend to external suppliers and partners involved in your sales pipeline.



CRM Software Deployment

Throughout the CRM procurement process, you should consider the different deployment options, and which will be most suited to your business and IT infrastructure.

On-Premise Deployment

Traditionally, CRM solutions have been deployed on office hardware, with data stored within on-site servers. This means the business is in complete control over data hosting and software implementation, though it means access to the CRM system is tied to specific hardware.

Cloud Deployment

Many CRM solutions are cloud-based, operating under a Software as a Service (SaaS) model. Cloud CRM systems are adaptable for remote working and mobile data access and can be a more affordable option for small businesses. If you want data to be available from any device at any hour, cloud deployment is the best option.

Mobile Deployment

CRM software can also be accessed via the cloud on mobile devices (smartphones, tablets). This expands the reach of access to the software for global teams. With remote and hybrid working now commonplace, mobile deployment provides added flexibility to cloud CRM software.

The table below outlines the key differences between on-premises and cloud-based software deployment.



















	Benefits	Challenges
Cloud CRM Software	<ul style="list-style-type: none">• No up-front costs for on-premise hardware and servers• Scalable and flexible depending on budget and/or usage• Lower burden on IT staff• Automatic backups	<ul style="list-style-type: none">• Limited access to system infrastructure• Dependent on network connectivity• Increased usage and data consumption can quickly raise costs
On-premise CRM Software	<ul style="list-style-type: none">• Lower network bandwidth usage and associated costs• Tighter data security and privacy• More control over servers, hardware, and access	<ul style="list-style-type: none">• Requires larger hardware and server investment• Compliance is solely your responsibility• Requires extra IT support and resources• Potentially limited scalability



CRM Comparison Table



















There are many CRM software options to choose from on the market, but to help you narrow down your search, we have compared some widely used solutions.

This data has been selected to provide a quick overview of different CRM systems based on a limited number of criteria. To find out more information about each solution and which ones best fit your requirements, get in touch with the software procurement experts at YourShortlist.

Product	Deployment	Relative Price	Free Trial	Database Management	Customer Service Automation	Email Marketing Automation	Social Integration	24/7 Support
		££	14-Day	✓	✓	✓	✓	X
		£	30-Day	✓	✓	✓	✓	✓
		££	14-Day	✓	X	✓	✓	✓
		£££	30-Day	✓	✓	✓	✓	✓
		£££££	N/A	✓	✓	✓	✓	✓
		£	21-Day	✓	✓	✓	✓	✓
		£££££	14-Day	✓	✓	✓	✓	X
		££	Demo + Free Plan	✓	X	✓	✓	X
		££	30-Day	✓	X	✓	✓	X



CRM Comparison Table (cont.)

Product	Deployment	Relative Price	Free Trial	Database Management	Customer Service Automation	Email Marketing Automation	Social Integration	24/7 Support
		£	14-Day	✓	X	✓	✓	X
		££	N/A	✓	✓	✓	✓	X
		£	14-Day	✓	X	✓	✓	✓
		£££	30-Day	✓	✓	✓	✓	X
		££££	N/A	✓	✓	✓	✓	X
		££	Demo	✓	✓	✓	✓	X
		££££	30-Day	✓	✓	✓	✓	✓
		£	30-Day	✓	✓	✓	✓	✓
		£	14-Day	✓	✓	✓	✓	✓

How to Choose CRM Software?

When embarking on aa CRM procurement project, you should consider the following criteria to make the most informed decision for your business:

Software Deployment On-premise, cloud, or a hybrid approach?	System Security Is the software secure and private?
Operational Compliance Is the system compliant or does it help you achieve compliance?	Platform Scalability Will the software be supported and updated as your business grows?
Data/Infrastructure Control How much customisation and access do you have?	Implementation & Ongoing Costs Will you achieve a return on investment?

To ensure your new CRM system can help you achieve your company’s goals, consider your future objectives and projected growth.

- Individuals from different departments should identify key requirements for their areas of expertise. Establish a project team to highlight requirements across the entire business.
- Allocate responsibility to key personnel for internal software support and maintenance post-implementation.
- Guaranteeing external software partner support in the early stages will negate the need for training further down the line.
- Review and map out your sales, customer service, and marketing processes to gain a picture of how the software will support your company and integrate with existing databases.
- Ensure buy-in from the team and that the CRM system will be utilised by all relevant members of staff (as well as ensuring they are trained in its use).
- Look for well-supported software that provides longevity and scalability to adapt to changes and growth within your business.



Shorty’s Shortcut:





Challenges with CRM procurement

For anyone looking to begin researching, selecting, and buying new CRM systems, keeping the following considerations in mind can make the process much easier:

Objectives

Clearly defining your goals for the CRM solution at the outset will narrow down your search criteria. This keeps your focus on systems that are relevant and achievable to implement for your business and offer the desired functionality.

Scale

As the scope of your CRM implementation escalates, so too can associated costs. The more data you must migrate to the new system, the longer and more costly the process becomes, so a data audit is essential.

Budget

CRM is often costly to setup, so you should be confident that the solution can achieve your desired results and provide the necessary functionality to make it a worthwhile investment that will provide value.

Other factors worth considering include:

- **Disruption**
Your chosen software should be easy to implement and not disrupt ongoing business.
- **Functionality**
The software should provide functionality that supports and improves your current business processes.
- **Reputation**
You should undertake sufficient research to ensure the software provider can deliver as they claim
- **Expansion & Support**
The software should be able to expand and grow with your business. The software provider should be able to support you during and post-implementation
- **Change Management**
Your team might be used to working and managing CRM functions a certain way. Ensure buy-in from the team to make the transition to a new solution as smooth as possible.
- **Implementation Time**
Consider how long a particular solution will take to implement for your business.



Next Steps

Once you've settled on your requirements and key criteria for what you want your CRM system to achieve, you can begin to research the market for options.

Rather than waste time and money sorting through hundreds of potential options, why not speak to someone that can manage the procurement process, so you don't have to.

1.

Typically, a selection and onboarding process for new CRM software can take between 6 and 12 months from start to finish.

2.

This would involve comparing options on the market to narrow down a longlist of around 10 to 12 providers.

3.

This would then be narrowed further to a shortlist of 6 to 8 providers.

4.

Finally, IT buyers must compare software options from each provider to determine their best overall solution.



Your CRM Needs. YourShortlist.

As a key decision maker, you'll have to do your research before choosing the best CRM solution for your business.

At YourShortlist, our goal is to make technology procurement simple, transparent, and cost-effective by matching businesses with the right software providers.

We're all about helping our members understand, choose, and implement the solutions that will facilitate successful growth. We manage a diverse database of 2000+ software partners providing solutions in ERP, CRM, cyber security, cloud migration, HR, and more.

With the help of YourShortlist, IT buyers across the globe have made better-informed decisions on new software, infrastructure, and managed services to improve their business.



Our non-chargeable service includes:

- Independent buying advice on the best CRM solutions and providers on the market
- Bespoke shortlist of specially selected partners experienced in implementing CRM solutions for your industry
- Partner background information and reviews available on our online portal
- Free call-backs from partners with no obligation to purchase

If you're searching for the best CRM system for your business, discuss your requirements with a member of our team and begin the journey today towards a free, no-obligation shortlist tailored to your business.

Book a Calendly meeting with our team or call us on **+44 (0) 20 4532 5532** and we can match you with the software partner you need.

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