

TOP 10 CRM SOFTWARE



TOP 10 CRM SOFTWARE

1

HubSpot

HubSpot CRM

2

Salesforce

Salesforce

3

Zoho

Zoho CRM

4

Pipedrive

Pipedrive

5

Freshworks

Freshsales

6

Zendesk

Zendesk Sell

7

Pipeline CRM

Pipeline CRM

8

Salesflare

Salesflare

9

Capsule

Capsule

10

Insightly

Insightly CRM



HOW THESE RANKINGS WERE GENERATED

This ranking was determined using a number of factors including industry standing, public opinion of software, social media presence, and available software features relevant to the needs of a small business. This ranking should serve as a rough estimate of software suitability, and more in-depth analysis can be taken below or by using our CRM software comparison.

FIND & COMPARE CRM





MUST-HAVE CRM FEATURES

Deciding what CRM features to invest in is a challenge; there are a number of questions to ask before choosing a CRM, and this guide will help you think about what features you need to consider. Let's look at six features which are critical to almost any CRM configurations, or our 'must-have' CRM features:

1. CONTACT MANAGEMENT

Contact management organizes customer data centrally; this includes basic details like name and address, plus more detailed information like demographics. It also tracks interactions between the business and customers.

Access to data allows businesses to maximize the relationships they have. For example, understanding more about each customer can improve sales and customer service. A manufacturing business with great data on clients can extend the right deals.

If everyone has access to the same data, it creates synergies across the organization. If sales, marketing, and customer service can all see the same data on a company, it helps collaboration. If a salesperson notes some information during the sales process, this may help the customer service team in the future. For example, if a customer expresses a worry about how a feature may work in their business, the customer services team can see this flagged up and can prioritize addressing the issue.

Detailed and accessible data on customers can significantly help efficiency across the whole organization. For example, easily accessible customer details can help the finance team with invoicing just as easily as it can help the relationship management team upsell new products.

HELPFUL CONTACT MANAGEMENT FEATURES

- Automatic updating of records from email accounts or submission forms.

- Use an API to link with a business intelligence database to automatically add more company information.
- Interact with contacts (calls, emails, and notes) directly in the CRM contact screen.

2. ANALYTICS AND REPORTING

Distilling a large amount of CRM data into business-critical analytics and reports is essential for most businesses. 18% of users cited getting a clear snapshot of business activity as the most important CRM feature.

Data isn't much use if it can't be mined and interpreted so a business can use it. For example, a sales team may want to drill down into how successful their outbound sales function is at converting leads or take a look at a snapshot of the pipeline.

Being able to analyze data quickly and easily allows businesses to improve its processes where necessary. It's fairly common that reviewing data can prompt a business to change how they operate a part of their business – it allows them to quantify their efforts and can provide surprising conclusions.

If people in a business know they're being judged on certain metrics in the CRM, it will motivate them to pay attention to the data and engage with the CRM, thus improving CRM usage across the organization as a whole.

HELPFUL ANALYTICS AND REPORTING FEATURES

- Customization is important because every business is slightly different and will need to interact with data in a unique way.
- Reports presented in a visual format; many employees engage better with visual reports. This can make it easier to digest and get the point of the data across.

3. LEAD MANAGEMENT

According to research by Pardot, 79% of leads fail to convert without CRM. Generating high-quality leads is one of the hardest business practices. Most businesses say that if they could solve this problem then their business would improve.

Driving high-quality leads is a big challenge for every business whether they are B2B or B2C. Implementing a CRM that supports lead management is a key step in generating the best leads.

Even SMBs may be running multi-channel marketing campaigns, and good lead management allows businesses to track everything. Leads may be coming in from diverse sources, for example, one campaign may aim at selling a new product to current customers, and another might be a brand new campaign aimed at a new market. Good lead management will allow businesses to get a clear view of how campaigns are performing and drive key activity like sales follow-ups and sending proposals.

HELPFUL LEAD MANAGEMENT FEATURES

- Lead reporting helps businesses keep a view of the whole pipeline.
- The web-to-lead form is a feature where online inquiries are turned into CRM records and routed to a salesperson.
- Simple and detailed filtering of data that builds campaigns helps businesses build and track marketing campaigns.

4. DEAL AND TASK MANAGEMENT

Prioritization is one of the key challenges faced by sales teams; there is often so much potential opportunity to pursue that it can be overwhelming. An effective deal and task management capability will allow a business and its employees to work on the most leveraged tasks.

An effective CRM will help salespeople to stay focused on the key deliverables. A key part of hitting deliverables is ensuring tasks are completed promptly.

It's critical because salespeople not only have to manage a large workload, they're often dealing with prospects at various stages in the sales funnel. For example, a sales rep may jump from an initial demo call into a detailed meeting with a prospect who has some detailed questions on their solution. A good management system will allow the salesperson to have visibility on the most important tasks.

HELPFUL DEAL AND TASK MANAGEMENT FEATURES

- Calendar sync and automatic reminders help to make sure nothing slips through the cracks.

- Reminders for deals at every stage of the process. A CRM that can deliver reminders within an appropriate time frame can add value, for example. For deals that are in the final stage or are of higher value, reminders can be more regular.
- Automatic actions that are set to send chaser emails to leads at a certain stage in the pipeline.

5. DASHBOARDS

Dashboards help give key information quickly. Many employees and managers will use dashboards as a quick view on progress – great dashboards can give clear oversight and drive pertinent activity.

For many users, the dashboard view is how they evaluate progress, so a great dashboard that is easy to read and provides the key information is a great tool for engaging users to invest time into the CRM. Some dashboards can be gamified to drive behavior, for example, telling a user their pipeline has grown by x% in the last week.

Users engage with CRMs if they are simple, and many people are visual in how they take in information. A dashboard view can be something that helps them understand the information contained within the CRM.

HELPFUL DASHBOARD FEATURES

- Dashboards that allow users to easily dive into the relevant detail are helpful. If you can see sales conversion is down by 22%, being able to bring up a list of deals that haven't converted may be helpful. This allows users to quickly diagnose the high-level problems the dashboard has alerted them to.
- Visual features like charts and graphs to help users digest information.
- The flexibility to customize dashboards to a users' favorite format improves engagement.
- Easy printing options can be helpful as many organizations still engage with hard copies in meetings.

6. MOBILITY

In the modern workforce flexibility to work at convenient times is important. Having a CRM that is easy to use across laptop, desktop, tablet, and phone is critical. Inoppl Technologies research suggests that sales reps that use mobile CRM achieve quotas 65% of the time, whereas in companies that haven't adopted mobile CRM only 22% of reps achieve quotas.

CRMs that dominate the mobile space take advantage of different platforms to enhance the experience. For instance, a dashboard is presented in the best way for the platform - a mobile screen won't be able to show the same data as a 20-inch laptop screen and acknowledging this and tailoring the experience is important for user engagement.

Being able to access information 'on-the-go' is important, especially for sales reps that are on the road a large portion of the time. Also, cynically it means that it's easier to access work information so they may be more inclined to work a few extra hours.

HELPFUL MOBILITY FEATURES

- Native apps for Android and iOS.
- Mapping and navigation to help visualize a contact on the map, this can also help map sales territories.
- Offline, online and hybrid connectivity, and background synchronization.



WHY NOT CREATE YOUR OWN COMPARISON?

With our free comparison engine you can build your own side-by-side comparison of leading CRM solutions. Narrow down your shortlist using filters including:

- Software Features
- Delivery Platform
- Company Size

FIND & COMPARE CRM



TOP 10 CRM SOFTWARE



OVERVIEW

PRODUCT NAME

HubSpot CRM

Salesforce

Zoho CRM

Pipedrive

SOFTWARE FEATURES

API ACCESS



CADENCE



CONTACT MANAGEMENT



CONTRACT MANAGEMENT



DATABASE MANAGEMENT



FUNNEL REPORTING



INTEGRATIONS



PARTNER TRACKING



PERFORMANCE REPORTING



PIPELINE MANAGEMENT	✓	✓	✓	✓
PRODUCT & PRICE CONTROL	✗	✗	✗	✓
SALES GAMIFICATION	✓	✓	✓	✗
QUOTATION HANDLING	✗	✓	✗	✗
TASK ASSIGNMENT	✓	✓	✓	✗
TERRITORY/QUOTA MANAGEMENT	✗	✓	✓	✗
SUPPLEMENTARY FEATURES				
CPQ	✗	✗	✗	✗
CUSTOMER SERVICE AUTOMATION	✓	✓	✓	✓
MARKETING AUTOMATION	✓	✓	✓	✗
SOCIAL RELATIONSHIP MANAGEMENT	✓	✓	✓	✗
CUSTOMER SIZE				
SMALL (1-50 USERS)	✓	✓	✓	✓
MEDIUM (51-200 USERS)	✓	✓	✓	✓

ENTERPRISE (201+ USERS)	✓	✓	✓	✓
OTHER FEATURES				
MULTIPLE LOCATIONS	✓	✓	✓	✗
MULTIPLE CURRENCY	✓	✓	✗	✗
CUSTOMIZABLE	✓	✓	✓	✓
MOBILE FEATURES				
IOS APP	✓	✓	✓	✓
ANDROID APP	✓	✓	✓	✓
NATIVE WEB APP	✓	✗	✓	✗
HOSTING METHOD				
CLOUD	✓	✓	✓	✓
ON-PREMISE	✗	✗	✗	✗
REVIEWS				
REVIEW SCORE				

OTHER INFORMATION				
PRICING	From Free	\$25/user/month* (billed annually). Up to 5 users	\$12/user/month	From \$12/user/month.
IMPLEMENTATION TIMEFRAME				



zendesk sell



OVERVIEW

PRODUCT NAME

Freshsales

Zendesk Sell (Formerly Base CRM)

Pipeliner CRM

Salesflare

SOFTWARE FEATURES

API ACCESS



CADENCE



CONTACT MANAGEMENT



CONTRACT MANAGEMENT



DATABASE MANAGEMENT



FUNNEL REPORTING



INTEGRATIONS



PARTNER TRACKING



PERFORMANCE REPORTING



PIPELINE MANAGEMENT	✓	✓	✓	✓
PRODUCT & PRICE CONTROL	✗	✗	✓	✗
SALES GAMIFICATION	✗	✗	✓	✗
QUOTATION HANDLING	✗	✗	✗	✗
TASK ASSIGNMENT	✓	✓	✓	✓
TERRITORY/QUOTA MANAGEMENT	✓	✗	✓	✗
SUPPLEMENTARY FEATURES				
CPQ	✗	✗	Data currently unavailable. Click here to suggest data for this product	✗
CUSTOMER SERVICE AUTOMATION	✓	✓		✗
MARKETING AUTOMATION	✗	✓		✗
SOCIAL RELATIONSHIP MANAGEMENT	✗	✗		✓
CUSTOMER SIZE				
SMALL (1-50 USERS)	✓	✓	✓	✓
MEDIUM (51-200 USERS)	✓	✓	✓	✓

ENTERPRISE (201+ USERS)	✗	✓	✓	✓
OTHER FEATURES				
MULTIPLE LOCATIONS	✓	Data currently unavailable. Click here to suggest data for this product	✗	✓
MULTIPLE CURRENCY	✓		✓	✗
CUSTOMIZABLE	✓		✗	✓
MOBILE FEATURES				
IOS APP	✓	✓	✓	✓
ANDROID APP	✓	✓	✓	✓
NATIVE WEB APP	✓	✓	✓	✓
HOSTING METHOD				
CLOUD	✓	✓	✓	✓
ON-PREMISE	✗	✗	✗	✗
REVIEWS				
REVIEW SCORE				

OTHER INFORMATION				
PRICING	Free/\$12/\$25/\$49 per user/month	\$25/user/month. Up to 5 users	Subscription pricing model. Starter: \$25. Business: \$65. Enterprise: \$85.	\$30/user/month (paid annually), \$35/user/month (paid monthly)
IMPLEMENTATION TIMEFRAME	2-3 weeks		2 weeks	1 Day



OVERVIEW

PRODUCT NAME

Capsule

Insightly CRM

SOFTWARE FEATURES

API ACCESS



CADENCE



CONTACT MANAGEMENT



CONTRACT MANAGEMENT



DATABASE MANAGEMENT



FUNNEL REPORTING



INTEGRATIONS



PARTNER TRACKING



PERFORMANCE REPORTING



PIPELINE MANAGEMENT	✓	✓
PRODUCT & PRICE CONTROL	✗	✗
SALES GAMIFICATION	✗	✗
QUOTATION HANDLING	✗	✗
TASK ASSIGNMENT	✓	✓
TERRITORY/QUOTA MANAGEMENT	✗	✗
SUPPLEMENTARY FEATURES		
CPQ	✗	✗
CUSTOMER SERVICE AUTOMATION	✗	✗
MARKETING AUTOMATION	✓	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓	✓
CUSTOMER SIZE		
SMALL (1-50 USERS)	✓	✓
MEDIUM (51-200 USERS)	✓	✓

ENTERPRISE (201+ USERS)	✗	✗
OTHER FEATURES		
MULTIPLE LOCATIONS	✗	✗
MULTIPLE CURRENCY	✗	✗
CUSTOMIZABLE	✓	✓
MOBILE FEATURES		
IOS APP	✓	✓
ANDROID APP	✓	✓
NATIVE WEB APP	✗	✗
HOSTING METHOD		
CLOUD	✓	✓
ON-PREMISE	✗	✗
REVIEWS		
REVIEW SCORE		

OTHER INFORMATION		
PRICING	£8/user/month.	Free up to 2 users. \$15/user/month.
IMPLEMENTATION TIMEFRAME		

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