

Customer Management System

Choosing the Best Customer Management System for your Small Business

What are your MUST HAVES?

Top 3 Features beyond basics:

1. _____
2. _____
3. _____

What's your budget?

Monthly? _____

Yearly? _____

Can you downgrade or
upgrade to customize
features? (Y / N)

Can you add/remove users to
minimize cost (Y / N)

Time for Trials

Taking some time to try out a few products that seem promising seems very time consuming. I get it. It's always going to feel like time wasted until you find the solution that's right for you. Even just a little time spent using the potential solutions as you'd want to use them can help eliminate the ones that just aren't going to measure up.



Customers are Key

As business owners, customer management is the name of the game. Whether you run a brick and mortar business or an online one, getting to know your customers and making sure they're taken care of is likely your highest priority.

Narrowed it down?

Time to start some pro and con lists. This isn't quite like the lists you may have made back in junior high. Once you've been searching around for just the right tool for your business it's easy to get caught up in the search and forget what tool did what. though tedious, the best method is always to keep tabs on the features that matter most to you and your business and have a quick reference to pros and cons of each.

Below is a handy checklist for your search. Input the names of each tool in the numbered boxes at the top and customize the features in the left column to fit your needs.

Features	1	2	3	4	5	6
Basic:						
Contact Details						
Phone/Text						
Email						
Notes						
Within Budget						
MUST HAVES:						
#1						
#2						
#3						
Advanced:						
Team Communication						
Sales Reports						
Lead Reports						
Workflow/ Approvals						
Mobile						
File Sharing						
Business Mgmt:						
Quotes						
Invoicing						
Accounting Integration						
Payments						
Contracts						
Products						