# ★ 7 Best Free CRM for Google ★

| Software | | Maximum Free Users | After limitation | Email Automation | Mobile CRM | Data Analytics Integration | Free storage | Model type |
|---|---|---|---|---|---|---|---|---|
| **Friday CRM** | Fri Friday CRM | **Free - Unlimited** | **100% Free** No limitations | YES | YES | YES | **Unlimited** | 100% Free & cloud-based |
| **Bitrix24** | Bitrix 24 | **Freemium - 12 users** | ☹ Paid | ☹ Paid | YES | YES | **5GB** | Free* & both cloud and Self-hosted |
| **Agile CRM** | Agile CRM | **Freemium -10 users** | ☹ Paid | YES | YES | YES | **X** | Free* & both cloud and Self-hosted |
| **Zoho CRM** | ZOHO CRM | **Freemium - 3 users** | ☹ Paid | YES | YES | YES | **1GB** | Free* & both cloud and Self-hosted |
| **Hubspot** | HubSpot | **Free - Unlimited** | ☹ Paid | ☹ Paid | YES | ☹ Paid | **Unlimited** | Free* & Self-hosted |
| **Freshsales** | freshsales | **Unlimited (Sprout plan)** | ☹ Paid | YES | YES | ☹ Paid | **X** | Free* & cloud-based |
| **Capsule** | Capsule | **Freemium – 2 users** | ☹ Paid | YES | YES | YES | **10MB** | Free* & cloud-based |

A CRM will help to obtain a common standardized base of contacts[1] for the company (customers, contractors).
A CRM will help effectively monitor the quality of the sales department at any given time, in combination with Google products[2].
A CRM will help get statistics and analytics of the effectiveness of working with leads (incoming calls, requests)[3].

*** Any variant of control and accounting that can help improve interaction with customers can be considered a Customer relationship management (CRM) system[4]. Even if you keep a history of calls and contacts on paper or in Google Sheets, this can be considered a CRM system if the developed accounting and control scheme works and allows you to control all options for interacting with customers.

**Who needs CRM systems?**

Before choosing a CRM for Google, you need to understand whether your business needs it in principle. It often happens that someone tells the business owner about the existence of such systems, or software vendors are trying to impose their product. But in fact - do you need this system?

CRM systems are necessary for any business that works directly with customers and seeks to expand the number of customers.

So, if incoming calls or requests (leads) from new customers are important in the business, if the business makes some efforts to receive and retain new customers, then a CRM system is necessary.

For example, an online store, a wholesale company or a beauty salon will not be able to work effectively without attention to leads (incoming requests and calls). Indeed, in each of these types of businesses it is very important that all orders are completed, customers of goods and services are satisfied, and customer loyalty is increased.

On the other hand, if your business is not interested in increasing the number of customers at this stage of development, if loyalty of regular customers is based on long-term contracts, and all contracts with new customers are based on personal meetings, even the best CRM for Google will not work.

For example, a retail store will not use the CRM system in its work, as it is impossible to fix customer contacts. Here, customer loyalty is based on product quality and service quality, i.e. in personal contact with the seller. Also, the CRM-system will not help in any case if the company has concluded long-term contracts for the supply of goods to the chain of stores, the supplier's capacities are barely enough to fulfill the orders of this trading network, and this is all right for everyone.

But if you are developing your business, if you invest in advertising, make other efforts in order to attract and retain customers, then the CRM system will be an excellent assistant in your work.

**What are CRM for Googles for?**

The question of explaining complex and new things is an integral part of my profession. And often you have to explain why a client needs a CRM system. What is this, a businessman can know for himself. But at the same time, very often representatives of small and medium-sized businesses do not understand why they need it. After all, the number of customers is relatively small, the sales department also in companies of this level consists of only a few people.And, it seems that even without a CRM system, it's easier to control work with customers. In fact, this is not so. Very quickly after the introduction of an automated system, a huge number of shortcomings are revealed, and the quality of the sales department grows significantly.

**CRM is needed in order to:**

Do not lose the potential client, do not miss a single incoming call and request. In small and medium-sized businesses in our country, competition is very high. Companies are making significant efforts to attract customers to pay attention to. Compared to other customer acquisition costs, a significant budget is allocated. And it is very important that all these tools and efforts are not wasted. Automated systems provide confidence that this is exactly what the sales team will do. You will receive a record of each incoming call, each request, each lead.

Monitoring the work of employees and standardizing work with clients. Without a common standardized CRM system, each employee works the way he is used to. Someone keeps records in spreadsheets, someone in a notebook or diary, someone does not keep records at all, focuses exclusively on reports from Quick Books or on their own memory. Contacts also occur quite randomly. Letters can be sent to clients from both corporate and personal mailbox, calls can be made from any convenient telephone, quality control is not possible. The CRM system almost completely solves this problem. Information about all incoming and outgoing contacts will be located in one repository, from where it can be extracted at any time.

A statistical base is accumulating, which is also very important for the successful development of any business. Thanks to the use of the CRM system, all operational information is collected in one common base in a standardized form. As a result, the manager can analyze work statistics, compile various reports (many of which are already ready-made in CRM systems), i.e. analyze work and plan future work more consciously.

Ready-made solutions from which you can build on your own work system. Each CRM system is the embodiment of a developers vision of how to work with a client. It contains many ready-made tools that allow you to transfer work to a whole new level. For example, the integration of a CRM system with telephony allows you to record all calls, remember all new contacts and analyze the quality of work of the sales department with leads. In small and medium-sized businesses, work with clients is most often directed directly by the head (owner) of the business. He does not have experts, and often does not have any experience in organizing work with clients. The manager has nothing to rely on in this matter, and therefore the sales department often does not work in the best way. The implementation of a CRM system allows you to get not only a tool, but also help, a developers' view on how the sales team should work. In their turn, when developing a CRM-system they usually rely on best practices, on experts in matters of working with clients. Therefore, if you actively use the tools provided by the CRM system, then the work of your sales department will also be optimized. Various tools of the system themselves suggest what steps should be taken in the process of optimizing work with clients.

In addition, the user of the CRM system will receive many other useful things, most of which depend on the selected system. But I always explain these four basic things, because they are very important for small and medium-sized businesses, and also because any of the existing CRM systems provides them.

**How to choose a CRM system?**

When choosing a CRM-system, the most important thing is to make sure that you have all the functions that you would like to see in the process. So, if incoming calls are very important for you, you need to make sure that the selected CRM system supports integration with telephony. And if you get most of the leads through the site, then one of the main criteria will be the ability to integrate a CRM system with your CMS.

Otherwise, a lot depends on your tastes, as well as on the recommendations that your specialist gives you. In principle, if a specialist who will be involved in the implementation of a CRM system offers you a specific software product, then, provided that the functions you need are implemented in this system and the cost of the product suits you, it makes sense to agree with his opinion. Usually, experts advise a product that they know well, which will undoubtedly be a plus at the implementation stage.

Studying a CRM system based on rollers and test access is quite difficult, there are many nuances in any system that you will learn in the process of working with the system. But there are some fundamental points that will help you make the right choice.

So, the main thing is the very fundamental decision to implement a CRM system. Further, if you have any preferences, you saw a system that you liked for some reason, implement it. In all other cases, it is best to rely on the opinion of a specialist.

**Saas or Stand-Alone - clouds or your own server?**

There are two types of CRM systems based on different technologies:

Saas or system as a service. With this option, all the software and data is located on the server of the service provider. You get online access to the system through a browser, client program or mobile application. All processes take place on the side of the service provider.

Standalone - a license to install and use a software product. You get a solution that you install on your own server, if you wish, modify it to your needs, depending on the capabilities that the CRM system provider provides.

There are some limitations waiting for you when choosing a Saas solution. You will not be able to change anything in the product code, since the software solutions are located on the side of the vendor of the CRM system. Typically, such CRM systems allow you to configure access rights for employees, integrate some external systems (receive data from the site, record incoming calls, etc.), change the design using the designer, configure reports, etc. But all this will be stored on the servers of the CRM-system provider.

It is also important to understand that when using Saas-solutions you should always have access to the Internet. Of course, in our time, reliable Internet has long been an important part of any business, in the absence of access to the network, many business processes stop. Therefore, the optimal solution is to have, in addition to the reliable main one, also a backup Internet access channel.

Another important point that you need to understand when choosing Saas-solutions: most likely, for each backup of the database and other similar operations you need to pay separately. For example, in a system that I actively use, backup costs $ 10 for 1 backup.

Pros of Saas solutions:

You do not need your own server to host the software;

You don’t need to do updates yourself, all this lies with the service provider, you just use the solution.

We can talk a lot about the CRM system as a Saas solution. Perhaps I will write a separate article about this. The features described above are sufficient to select the type of solution.

Stand-Alone solutions, as I said above, are the purchase of a “boxed” solution that you install on your own server and can change the program code (as part of the access provided by the developer). In some cases, for example, when it becomes necessary to implement atypical solutions, this level of access is very important.

But more often than not, no solutions are required for Stand-Alone SMEs. The need for profound changes is extremely rare, and therefore I usually recommend Saas.

**Telephony Integration**

I believe that any CRM system should integrate with telephony. If you can’t record incoming calls and initiate outgoing calls, this is a big minus. Therefore, when choosing a software product for my clients, I always pay particular attention to the availability of this feature, as well as how it is implemented.

It would seem that you can enter data on calls into the system manually. But practice shows that this method does not work. People begin to resist, they are annoyed by the need to do extra work. In addition, anyone can simply forget to make this or that important call into the system. Therefore, this method usually does not work in practice.

So, it is necessary to record calls in the system. There are 2 implementation options:

The call is made from the browser itself, it passes completely through the system, all interaction occurs through the browser. It is important to understand that the entire call passes through the system, and therefore sound quality, signal processing speed, etc. depend on the browser and CRM code.

Telephony integrates with third-party services - asterisk, avaya, etc. In this case, you install a virtual telephony system based on these services and connect your numbers to this telephony. At the same time, you can make all outgoing calls and receive incoming calls through sip tubes, and not through a browser. How does this happen? Your sip provider accepts the call from the client, redirects it to your virtual PBX system, and it already transfers the call information to the CRM program. At the same time, the phone number, time, call duration, etc. are recorded in the CRM database. The user only needs to add his notes to the call recording (brief conversation topic, result, comments).

Of course, there is another option for recording information about calls manually, but I already described above why this will not work in practice. Basic routine operations must be automated, otherwise the system will not work.

**API integration: availability of turnkey solutions**

Any business uses various services for receiving applications, keeping records, processing documents, etc. When choosing a CRM system, you should pay attention to whether there are API solutions for integrating with your website, exchanging data with Quick Books, IT telephony, and other programs you need. and services. Having a ready-made integration API is a big plus.

Interaction with a contact (client) usually consists of several things:

Phone calls;

Email Correspondence;

Newsletters (SMS or email);

Meetings

The first 3 things should be automated. They give an idea of the history of relationships with the client, help to understand what is happening in working with him at the moment, what were the latest actions.

Planning and working with tasks

When choosing a CRM system, you should also pay attention to whether the system has the ability to plan, set up and work with tasks. Employees should be able to create tasks for themselves and colleagues, set reminders, etc.

In addition to working with clients, the CRM system should have the necessary tools to account for interactions between employees. It is not enough that they communicate with each other in the office or over the phone, discuss projects and solve some problems. You must also be able to control the workflow and employee interactions.

Users should be able to set themselves and others tasks related to both working with the client, and reporting, with other necessary actions. Also a very convenient function is the ability to tune the automatic task setting service, for example, once a quarter the task of processing quarterly reports will be created, etc. Or, when the system receives the contact information of a potential customer (the appearance of a new lead), the system will automatically create a task for a specific employee, for example, call back on a specified phone number.

Integration with SMS service

As such, I have not seen integration with SMS services, for example, a turnkey solution for integration with certain SMS mailing services. This is done as part of business processes or as part of working with the API. Accordingly, the system should have the possibility of mass SMS distribution for all customers, for a specific group of contacts or personally for a specific contact (for example, notification of certain actions).

Data import

Carefully consider what features the CRM system provides for importing data. In what format can information be downloaded? Is there a ready-made migration module from other systems, and, if so, from which? Or do you need to prepare information for download in a specific format?

You must understand how the primary data will be populated at system startup. This process is somewhat similar to entering residuals into the system, which I wrote about in the article.

It is very important that data is imported quickly, simply and transparently. Without a convenient automatic transfer of all contacts and other important information for the work, the launch of the system will most likely fail. Of course, you can enter all the data manually, but it is very long and inconvenient. And if you enter this data in parts, then the risk of duplicating customer cards increases, as a result, confusion and overlays await you.

Personally, I really like the option of transferring data from an Excel spreadsheet, this option is universal, quite intuitive and convenient. In Excel, it is possible to download from almost any system, including Quick Books. And uploading data in this format to the system is also quite fast and convenient.

Localization

This parameter is not the most relevant today, since most powerful widely known CRM systems have long had Russian localizations. But, nevertheless, when choosing software, this parameter should always be paid special attention, since without Russian localization, you and your employees may have difficulty in working. In addition, I believe that it makes no sense to deprive yourself of comfort in work, if this can be avoided.

Licensing: Open Source or Proprietary Architecture?

The difference between Open Source and proprietary architecture is that in the first case, you get an open source system, and in the second - with closed source. It is clear that here we are talking about licensing options for Stand-Alone software products, since any Saas system has a closed code by default.

Proprietary (closed) architecture is sold mainly by large developers. In this case, you get a powerful system in which you can make changes within the limits indicated by the developer. I personally don’t see anything bad here, because, as I wrote above, it is extremely rare for any medium or small business to require any atypical solutions.

The Open Source license (open source) is distinguished by developments created primarily on the basis of some kind of CMS. In this case, you get extremely broad opportunities for integration and work with the site or another system. On the other hand, such CRM-modules in many respects lose to large CRM-systems, specially designed to take into account customer relationships.

Contacts and counterparties

When choosing a CRM-system, pay special attention to how the directories are implemented, what is their structure. So, if you work only with individuals, then one level will be enough for you - this is the contact (client). In this case, in principle, any variant of the structure of the contacts directory is suitable for you.

Another thing if you work with legal entities. In this case, your contact is an organization. But different people can call on behalf of this contact, for example, an accountant, a procurement manager, a storekeeper, a manager, etc. It is very important that the CRM system provides the ability to create a card for each contact person (counterparty) separately, as well as combine them into one common contact, organization. This is very important, since otherwise it will not work to organize a sufficient level of automation of customer service control.

System cost

Before launching a software solution, any businessman asks himself how much will it cost? When determining the price of CRM, you need to understand that the numbers that you see on the sites in the “product cost” or “license cost” section are only part of the total costs. Therefore, it is worthwhile to figure out what the total cost of implementing a CRM system is made up of.

The total cost of the product consists of several parts:

The cost of the license (purchase). This may be a payment for access to "cloud solutions" or the cost of 1 copy.

Transfer data to the system. You will definitely need to somehow transfer contacts and other data. Therefore, the presence or absence of a ready-made module, as well as the complexity of the preparatory preparation of data for import, will also affect the final cost.

The cost of refinement. Even if you bought a “boxed solution” or access to the saas version, some improvements will still be required. You will need to configure access rights, reports, tasks, etc.

Maintenance cost.

In addition, many miss one more important, but not so obvious point. These are financial losses during the transition period. You need to understand in advance that during the transition to the CRM system, some problems may arise, due to which you may lose some leads, untimely work them out, etc.

When introducing any software, some difficulties arise. Even if the seller of the software product tells you that it’s enough to make a payment and you can start working right away, anyway, in practice there are problems, malfunctions, overlays due to the human factor (employees still do not know how to use the new system or are not good enough, etc. )

You will also have indirect costs during implementation. So, your employees, instead of performing direct duties, will devote part of the time to training and checking the operation of the system. Also, the head will be forced to devote part of the working time to solving issues related to the implementation of CRM, as well as to monitoring the work to solve this problem.

If you understand in advance that the costs at the implementation stage will certainly be there, if you are ready for the need to allocate time and energy for the implementation of the CRM system, if you prepare for possible overlaps, then all these costs can be minimized, and the process itself made as simple as possible and painless.

License cost

Depending on the type of CRM system you have chosen, there are various options for purchasing a license. You can:

Buy a perpetual license.

Buy a license (subscription) for a specific period (month, year, etc.)

Buy a copy of the program to install on your own server.

A perpetual license is acquired once and is valid on an ongoing basis. This is convenient, but the amount you need to pay immediately is usually quite significant.

Subscription means the purchase of access to the system for a certain period. The subscription cost is usually low, but you will have to make payments regularly to extend access to the CRM system.

When comparing the cost of licenses, you must also take into account the marketing moves that sellers often resort to. So, very often sellers of CRM systems on the site advertise the minimum price for a service package, which will only work under certain conditions. But in reality, you will have to pay more for this system.

For example: on the page with the description of the service package, the price is $ 40 per 1 user per month. But if you carefully read the entire text, including callouts and notes, it turns out that this price is only valid if you purchase at least 10 licenses simultaneously for a period of 1 year. And if you need only 9 licenses, the price will already be different.

Similar marketing tricks are very characteristic of the IT market. But I plan to talk in detail about licensing tricks in a separate article. And now it’s enough just to remember that you need to be careful about the conditions of price formation so as not to be deceived in your calculations.

In case of purchase of the program you pay once an unlimited number of licenses. You will not need to pay for access to the program either periodically or in case of expansion of the staff. But any updates to your program will be paid.

Improvements and system startup as part of its cost

The work on setting up, finalizing and launching the software also needs to be taken into account when calculating the total cost of the CRM system.

You will need:

Install software (when buying a program, a large amount of work, server setup, and much more will be required, in case of Saas solutions, it may be necessary to install client programs on computers, tablets, mobile phones)

Set up user groups, set access rights for all groups of employees who will work with the CRM system.

Integrate the CRM system with other services and programs (set up information exchange with a website, Quick Books databases, telephony, etc.)

Transfer data from other systems and programs.

Very often, when calculating costs, users forget to consider data transfer, which is a serious mistake. Data transfer is one of the biggest expenses at system startup. The data must be extracted from the existing system, processed, standardized, corrected errors in them, and only then this data can be loaded into the CRM-system.

For example, I usually offer my clients a service such as a phone fix. This is a very common problem: in Quick Books counterparty cards, in Excel spreadsheets and in many other programs, customer phones can be recorded arbitrarily. As a result, some of the records appear in the format “+ 7 ...”, some begin with a figure of eight, some are landline numbers without a city code, etc. In order for these phones to be correctly entered into the CRM-system, they must be standardized, given in a certain form (most often in the international format).

It is also important to understand that you will need improvements in any case. Even if you get a complete turnkey boxed solution, you still probably need to refine something. It is better to focus on the fact that you will need to pay for the services of a specialist in this matter as well.

What to refine if a Saas solution is chosen?

On the one hand, when using the Saas solution, you do not have access to the code, and therefore there is nothing for the programmer to modify. On the other hand, Saas platforms provide ample opportunity to configure various forms and reports, business processes, user rights, the appearance of your work system, etc. This work should also be entrusted to a specialist.

In addition, you will need to integrate your CRM system with the site, Quick Books, telephony, etc. This work is also performed by a specialist, and therefore its cost must be taken into account.

Standalone solutions require additional investments: buying or renting a server, setting it up, purchasing additional software, etc. It is important to understand that when you buy a Standalone solution, you just buy a copy of the program. And all further costs associated with its installation, configuration, its use, you take on yourself.

Escort

You need to understand that failures occur in any system, and first of all it concerns Standalone solutions. And accompaniment is the work of a specialist, and it must also be paid.

When choosing Saas solutions, you may not need support or it will cost a minimum amount. More often than not, a once tuned solution works great, unless, of course, you try to experiment with the settings yourself.

Why Saas systems do not require ongoing support:

Such systems are usually very well debugged, and specialists constantly monitor the performance of the software.

The functionality of such systems is quite severely limited, since it is designed to solve a certain range of problems and nothing more.

The interface is usually intuitive, and specialist assistance is not required to complete most of the actions.

Let me remind you that for small and medium-sized businesses I usually recommend Saas-solutions for implementing CRM-systems. And the savings in implementation and maintenance is far from the last factor.

Are CRM systems?

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But more often than not, no solutions are required for Stand-Alone SMEs. The need for profound changes is extremely rare, and therefore I usually recommend Saas.

Telephony Integration

I believe that any CRM for Google should integrate with telephony. If you can’t record incoming calls and initiate outgoing calls, this is a big minus. Therefore, when choosing a software product for my clients, I always pay particular attention to the availability of this feature, as well as how it is implemented.

It would seem that you can enter data on calls into the system manually. But practice shows that this method does not work. People begin to resist, they are annoyed by the need to do extra work. In addition, anyone can simply forget to make this or that important call into the system. Therefore, this method usually does not work in practice.

So, it is necessary to record calls in the system. There are 2 implementation options:

The call is made from the browser itself, it passes completely through the system, all interaction occurs through the browser. It is important to understand that the entire call passes through the system, and therefore sound quality, signal processing speed, etc. depend on the browser and CRM code.

Telephony integrates with third-party services - asterisk, avaya, etc. In this case, you install a virtual telephony system based on these services and connect your numbers to this telephony. At the same time, you can make all outgoing calls and receive incoming calls through sip tubes, and not through a browser. How does this happen? Your sip provider accepts the call from the client, redirects it to your virtual PBX system, and it already transfers the call information to the CRM program. At the same time, the phone number, time, call duration, etc. are recorded in the CRM database. The user only needs to add his notes to the call recording (brief conversation topic, result, comments).

Of course, there is another option for recording information about calls manually, but I already described above why this will not work in practice. Basic routine operations must be automated, otherwise the system will not work.

API integration: availability of turnkey solutions

Any business uses various services for receiving applications, keeping records, processing documents, etc. When choosing a CRM system, you should pay attention to whether there are API solutions for integrating with your website, exchanging data with Quick Books, IT telephony, and other programs you need. and services. Having a ready-made integration API is a big plus.

Interaction with a contact (client) usually consists of several things:

Phone calls;

Email Correspondence;

Newsletters (SMS or email);

Meetings

The first 3 things should be automated. They give an idea of the history of relationships with the client, help to understand what is happening in working with him at the moment, what were the latest actions.

Planning and working with tasks

When choosing a CRM for Google, you should also pay attention to whether the system has the ability to plan, set up and work with tasks. Employees should be able to create tasks for themselves and colleagues, set reminders, etc.

In addition to working with clients, the CRM system should have the necessary tools to account for interactions between employees. It is not enough that they communicate with each other in the office or over the phone, discuss projects and solve some problems. You must also be able to control the workflow and employee interactions.

Users should be able to set themselves and others tasks related to both working with the client, and reporting, with other necessary actions. Also a very convenient function is the ability to tune the automatic task setting service, for example, once a quarter the task of processing quarterly reports will be created, etc. Or, when the system receives the contact information of a potential customer (the appearance of a new lead), the system will automatically create a task for a specific employee, for example, call back on a specified phone number.

Integration with SMS service

As such, I have not seen integration with SMS services, for example, a turnkey solution for integration with certain SMS mailing services. This is done as part of business processes or as part of working with the API. Accordingly, the system should have the possibility of mass SMS distribution for all customers, for a specific group of contacts or personally for a specific contact (for example, notification of certain actions).

Data import

Carefully consider what features the CRM for Google provides for importing data. In what format can information be downloaded? Is there a ready-made migration module from other systems, and, if so, from which? Or do you need to prepare information for download in a specific format?

You must understand how the primary data will be populated at system startup. This process is somewhat similar to entering residuals into the system, which I wrote about in the article.

It is very important that data is imported quickly, simply and transparently. Without a convenient automatic transfer of all contacts and other important information for the work, the launch of the system will most likely fail. Of course, you can enter all the data manually, but it is very long and inconvenient. And if you enter this data in parts, then the risk of duplicating customer cards increases, as a result, confusion and overlays await you.

Personally, I really like the option of transferring data from an Excel spreadsheet, this option is universal, quite intuitive and convenient. In Excel, it is possible to download from almost any system, including Quick Books. And uploading data in this format to the system is also quite fast and convenient.

Localization

This parameter is not the most relevant today, since most powerful widely known CRM systems have long had Russian localizations. But, nevertheless, when choosing software, this parameter should always be paid special attention, since without Russian localization, you and your employees may have difficulty in working. In addition, I believe that it makes no sense to deprive yourself of comfort in work, if this can be avoided.

Licensing: Open Source or Proprietary Architecture?

The difference between Open Source and proprietary architecture is that in the first case, you get an open source system, and in the second - with closed source. It is clear that here we are talking about licensing options for Stand-Alone software products, since any Saas system has a closed code by default.

Proprietary (closed) architecture is sold mainly by large developers. In this case, you get a powerful system in which you can make changes within the limits indicated by the developer. I personally don't see anything bad here, because, as I wrote above, it is extremely rare for any medium or small business to require any atypical solutions.

The Open Source license (open source) is distinguished by developments created primarily on the basis of some kind of CMS. In this case, you get extremely broad opportunities for integration and work with the site or another system. On the other hand, such CRM-modules in many respects lose to large CRM-systems, specially designed to take into account customer relationships.

Contacts and counterparties

When choosing a CRM-system, pay special attention to how the directories are implemented, what is their structure. So, if you work only with individuals, then one level will be enough for you - this is the contact (client). In this case, in principle, any variant of the structure of the contacts directory is suitable for you.

Another thing if you work with legal entities. In this case, your contact is an organization. But different people can call on behalf of this contact, for example, an accountant, a procurement manager, a storekeeper, a manager, etc. It is very important that the CRM for Google provides the ability to create a card for each contact person (counterparty) separately, as well as combine them into one common contact, organization. This is very important, since otherwise it will not work to organize a sufficient level of automation of customer service control.

System cost

Before launching a software solution, any businessman asks himself how much will it cost? When determining the price of CRM, you need to understand that the numbers that you see on the sites in the “product cost” or “license cost” section are only part of the total costs. Therefore, it is worthwhile to figure out what the total cost of implementing a CRM system is made up of.

The total cost of the product consists of several parts:

The cost of the license (purchase). This may be a payment for access to "cloud solutions" or the cost of 1 copy.

Transfer data to the system. You will definitely need to somehow transfer contacts and other data. Therefore, the presence or absence of a ready-made module, as well as the complexity of the preparatory preparation of data for import, will also affect the final cost.

The cost of refinement. Even if you bought a “boxed solution” or access to the saas version, some improvements will still be required. You will need to configure access rights, reports, tasks, etc.

Maintenance cost.

In addition, many miss one more important, but not so obvious point. These are financial losses during the transition period. You need to understand in advance that during the transition to the CRM system, some problems may arise, due to which you may lose some leads, untimely work them out, etc.

When introducing any software, some difficulties arise. Even if the seller of the software product tells you that it’s enough to make a payment and you can start working right away, anyway, in practice there are problems, malfunctions, overlays due to the human factor (employees still do not know how to use the new system or are not good enough, etc. )

You will also have indirect costs during implementation. So, your employees, instead of performing direct duties, will devote part of the time to training and testing the system. Also, the head will be forced to devote part of the working time to solving issues related to the implementation of CRM, as well as to monitoring the work to solve this problem.

If you understand in advance that the costs at the implementation stage will certainly be there, if you are ready for the need to allocate time and energy for the implementation of the CRM system, if you prepare for possible overlaps, then all these costs can be minimized, and the process itself made as simple as possible and painless.

License cost

Depending on the type of CRM for Google you have chosen, there are various options for purchasing a license. You can:

Buy a perpetual license.

Buy a license (subscription) for a specific period (month, year, etc.)

Buy a copy of the program to install on your own server.

A perpetual license is acquired once and is valid on an ongoing basis. This is convenient, but the amount you need to pay immediately is usually quite significant.

Subscription means the purchase of access to the system for a certain period. The subscription cost is usually low, but you will have to make payments regularly to extend access to the CRM system.

When comparing the cost of licenses, you must also take into account the marketing moves that sellers often resort to. So, very often sellers of CRM systems on the site advertise the minimum price for a service package, which will only work under certain conditions. But in reality, you will have to pay more for this system.

For example: on the page with the description of the service package, the price is $ 40 per 1 user per month. But if you carefully read the entire text, including callouts and notes, it turns out that this price is only valid if you purchase at least 10 licenses simultaneously for a period of 1 year. And if you need only 9 licenses, the price will already be different.

Similar marketing tricks are very characteristic of the IT market. But I plan to talk in detail about licensing tricks in a separate article. And now it's enough just to remember that you need to be careful about the conditions of price formation so as not to be deceived in your calculations.

In case of purchase of the program you pay once an unlimited number of licenses. You will not need to pay for access to the program either periodically or in case of expansion of the staff. But any updates to your program will be paid.

Improvements and system startup as part of its cost

The work on setting up, finalizing and launching the software also needs to be taken into account when calculating the total cost of the CRM for Google.

You will need:

Install software (when buying a program, a large amount of work, server setup, and much more will be required, in case of Saas solutions, it may be necessary to install client programs on computers, tablets, mobile phones)

Set up user groups, set access rights for all groups of employees who will work with the CRM system.

Integrate the CRM for Google with other services and programs (set up information exchange with a website, Quick Books databases, telephony, etc.)

Transfer data from other systems and programs.

Very often, when calculating costs, users forget to consider data transfer, which is a serious mistake. Data transfer is one of the biggest expenses at system startup. The data must be extracted from the existing system, processed, standardized, corrected errors in them, and only then this data can be loaded into the CRM-system.

For example, I usually offer my clients a service such as a phone fix. This is a very common problem: in Quick Books counterparty cards, in Excel spreadsheets and in many other programs, customer phones can be recorded arbitrarily. As a result, some of the records appear in the format "+ 7 ...", some begin with a figure of eight, some are landline numbers without a city code, etc. In order for these phones to be correctly entered into the CRM-system, they must be standardized, given in a certain form (most often in the international format).

It is also important to understand that you will need improvements in any case. Even if you get a complete turnkey boxed solution, you still probably need to refine something. It is better to focus on the fact that you will need to pay for the services of a specialist in this matter as well.

What to refine if a Saas solution is chosen?

On the one hand, when using the Saas solution, you do not have access to the code, and therefore there is nothing for the programmer to modify. On the other hand, Saas platforms provide ample opportunity to configure various forms and reports, business processes, user rights, the appearance of your work system, etc. This work should also be entrusted to a specialist.

In addition, you will need to integrate your CRM system with the site, Quick Books, telephony, etc. This work is also performed by a specialist, and therefore its cost must be taken into account.

Standalone solutions require additional investments: buying or renting a server, setting it up, purchasing additional software, etc. It is important to understand that when you buy a Standalone solution, you just buy a copy of the program. And all further costs associated with its installation, configuration, its use, you take on yourself.

Escort

You need to understand that failures occur in any system, and first of all it concerns Standalone solutions. And accompaniment is the work of a specialist, and it must also be paid.

When choosing Saas solutions, you may not need support or it will cost a minimum amount. More often than not, a once tuned solution works great, unless, of course, you try to experiment with the settings yourself.

Why Saas systems do not require ongoing support:

Such systems are usually very well debugged, and specialists constantly monitor the performance of the software.

The functionality of such systems is quite severely limited, since it is designed to solve a certain range of problems and nothing more.

The interface is usually intuitive, and specialist assistance is not required to complete most of the actions.

Let me remind you that for small and medium-sized businesses I usually recommend Saas-solutions for implementing CRM-systems. And the savings in implementation and maintenance is far from the last factor.

1. https://support.google.com/a/users/answer/9310345?hl=en
2. https://fridaycrm.com/blog/free-crm-for-google/
3. https://www.salesforce.com/products/what-is-salesforce/