

OVERVIEW

Why Your Choice Matters

A CRM is more than a contact database. The right platform helps small-to-medium sized businesses work cohesively to streamline operations, improve customer relationships, and drive growth.

A good CRM helps you:

- Manage and analyze customer interactions
- Automate repetitive tasks
- Provide actionable insights for decision-making
- Improve collaboration across departments

The key is picking a CRM that aligns with your business goals and processes—not chasing features for their own sake—and tie-in with other sales and marketing goals.

“Be cautious of lofty promises. Any CRM can ultimately improve efficiency, but it requires significant set up and an adoption ramp.”

Jacob Werre
TRG Account Supervisor



REALITY CHECK

Expect an adjustment period as your team learns the new system.

KEY FACTORS

Use this checklist to evaluate options. Check each box only when you see clear evidence in demos or trials.

- ☐ **Ease of Use**
Is the system intuitive and likely to enhance productivity (not complicate it)?
- ☐ **Customization Options**
Can you tailor fields, dashboards, pipelines and workflows, and needed integrations?
- ☐ **Scalability**
Will it grow with you and add more advanced features as needs evolve?
- ☐ **Budget**
Do pricing and plans fit your reality—from free tiers to enterprise—while delivering value?
- ☐ **Integration Capabilities**
Does it connect well with your existing tools (marketing, accounting, communication, etc.)?
- ☐ **Support & Training**
Are onboarding resources and help channels strong enough for a smooth start?
- ☐ **Realistic Expectations**
Have you accounted for the effort to set up and implement properly (including an adjustment period)?

OPTIONS TO CONSIDER

Zoho CRM

Affordable and user-friendly with workflow automation, email integration, and detailed analytics. Modular pricing lets you scale as you grow.

Monday.com

A visually appealing, easy-to-use platform that can function as a CRM with customizable workflows, team collaboration features, and automation—great for teams prioritizing alignment and task management.

HubSpot CRM

A strong, intuitive entry point with a free CRM; combines marketing, sales, and service tools. Free version is feature rich, with premium upgrades for advanced needs.

Salesforce

A market leader offering comprehensive tools, strong scalability, extensive customization, and third party integrations—powerful for growing organizations ready for a robust system.

HOW TRG MARKETING FITS IN

TRG Marketing is **CRM-agnostic**.

We work with a variety of systems and tailor our marketing strategies to align with the tools our clients already use. Whether you're integrating a CRM into your marketing or leveraging external resources alongside it, we can help you make the most of your investment.



Ready for next steps?

Contact TRG Marketing to discuss how to evaluate the right CRM for your business.

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