

Executive Summary

This report contains the results of a comparison of the Customer Relationship Management (CRM) tools that will help you help stay connected to your customers.

Includes:

- Problems you are trying to solve,
- The features that are needed to solve those problems,
- Comparing the tools and the reasons for selection one over another
- A detailed chart comparing the tools and a
- Glossary of terms

Recommendation

There are many Customer Relationship Management tools on the market today that range from free to tens of thousands of dollars. After doing a "paper evaluation" of many of the options, this report compares options from 37Signals (Publisher of Basecamp and Highrise) and Insightly. Each is a web-based "cloud" service, each has very low startup costs, and each can address the key challenges most organizations face with tracking customer contacts.

The three options are Highrise CRM, Basecamp Project Management, and Insightly. These are all powerful and relatively inexpensive tools. Based on features and cost, I'd recommend that most small businesses set up [Insight.ly](http://insight.ly) for projects and CRM.

Problem

You need to organize, track, coordinate and follow up with leads and contacts needed to support the event.

Using spreadsheets is helpful, but it's hard to:

- a. Make sure that you're using the right version, keeping everything in sync between versions (e.g. Tom updates a local copy based on his work, and Dexter updates a local copy based on his work. How do you keep both sets of changes?)
- b. Grant and revoke access to people easily (if they have a copy, how do you take it away?)
- c. It's hard to find information in a large spreadsheet.
- d. People may not be consistent in the way that they use the spreadsheet - I might put email addresses in one column, and you might put the work email in a different column, or in a different format.

Who are the people in my network?

Who do you talk to in the course of your business?

- Current customers
- Potential customers/leads
- Team members
- Vendors
- Partners
- Sponsors
- The list goes on.....

How do you make sure that you stay in touch with each group?

Needed Features

Ideally a system or tool would support:

- a. Tracking who is "on the list" and what group they belong to
- b. Track all communications - (tasks, phone calls, emails)
- c. Provide a mechanism to assign work to others on the team
- d. Give visibility to appropriate team members to make sure everyone is on the same page
- e. Organize groups of tasks together by person, by team, by project milestone
- f. An easy "dashboard" showing latest updates/activity
- g. Easy access to the tool - lowering barriers, helping team members put updates into the tool.
- h. Easy import and export of data
- i. Low cost
- j. Sales pipeline management

Discussion of the tools and features

I have used 37Signals tools commercially with terrific success. Their offerings include HighRise contact management, and Basecamp Project management. 37Signals prides themselves on "simple, essential functions" with a "minimalist" approach. They do very few things, but what they do is super easy to use, fast, and efficient. The cost for the tools is relatively cheap - starting at free, and ramping up to about \$50-\$75/month as your needs merit the increased costs.

37Signals' solution includes a combination of Highrise CRM and Basecamp project management.

Highrise is the basic Customer Relationship Management toolkit. This allows tracking of people, contacts, communications and very limited task and pipeline management functions.

Basecamp is a terrific project management toolkit. It makes for easy collaboration of tasks whether people are working in the same room or across the world. It's simple to use, has powerful permissions, and allows many many projects to be managed at the same time for a low cost.

Earlier this year I moved my business from 37Signals to Insight.ly.

Insightly is a very powerful toolkit, and incorporates both CRM and project management into the same application. This makes it easier to keep track of status, and gives a single list of tasks which can show everything that needs to happen organized by person or by project.

Insightly has more powerful sales pipeline management, better task management, and integrates CRM and projects. On the negative side, the permissions are more "liberal" making it harder to block people from access to project information. It also counts users differently for project management, so you may have to pay a higher monthly fee to run bigger projects managing more people.

I use Google Apps for Business. Insight.ly has a direct integration with Google Apps. This makes user management simple, and allows me some "extras" because their tool works nicely with Gmail.



Comparison of features and costs

	37Signals	37Signals	Insightly
	Highrise	Basecamp	Insight.ly
a. Tracking who is "on the list" and what group they belong to	Part of the basic functions of the tool	Not included	Part of the basic function of the tool
b. Track all communications (tasks, phone calls, emails)	Simple task manager, excellent note and email tracking. Easily create/update notes from email. Also includes a powerful web client and a mobile application.	Tracks these, but not integrated with Highrise. You have to look in two places for info.	Using the web interface, this is easy. Does not allow task creation or updating notes via email. Must use the web interface or the mobile app.
c. Provide a mechanism to assign work to others on the team	Very limited task manager.	This is the core of this tool. It is excellent and powerful.	Included as a part of the tool. Works well, but limited control of permissions.
d. Give visibility to appropriate team members to make sure everyone is on the same page	Easy to set up and works very well.	Easy to set up and works very well.	Easy to set up, but permissions are limited.
e. Organize groups of tasks together by person, by team, or by project milestone	Can organize tasks by person.	Very flexible access control and permissions. Easy to manage.	The most flexible and integrated option.
f. An easy "dashboard" showing latest updates/activity	Core part of the tool. May need to check in two tools for complete picture.	Core part of the tool. May need to check in two tools for complete picture.	Core part of the tool.
g. Easy access to the tool - lowering barriers, helping team members put updates into the tool	Highrise is the best at this - web client, iphone app, mobile app, even send task and contacts updates via email.	Web client and task updates via email.	Web client and mobile web client are good options for this.

Customer Relationship Management: Comparison of Highrise/Basecamp & Insight.ly



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	37Signals	37Signals	Insightly
h. Easy import and export of data	Strong, flexible import, full export possible.	Never tried to use this function.	Strong and flexible import, full export possible.
i. Cost for 5 users. All three tools are free for 30 days, and then prices go up - as you need more, the price increases up to the max listed.	\$24/month (Max of \$99/month)	\$20/month (Max of \$150/month)	\$29/month (Max of \$99/month)
j. Sales pipeline management	Available, but very weak. Not particularly useful.	Not available.	Decent pipeline management.
Signup page	http://highrisehq.com/signup	http://basecamp.com/signup	http://insightlyapp.com/pricing

Glossary

Activities -

These are groups of tasks. An activity might be "Prepare to leave for vacation" which might include a set of tasks like: buying supplies, packing luggage, loading the car, getting gas, have a neighbor pick up mail, etc.

Contacts -

The people you interact with. They may be sponsors, clients, partners, vendors, suppliers - anyone you interact with and want to track information about.

Customer Relationship Management - CRM -

A tool which allows you to have visibility into the communications you have with contacts. A well run CRM system includes a tool and a set of procedures that everyone in the organization follows, providing a consistent customer relationship experience for your contacts.

Sales Pipeline Management -

The process of:

- Identifying prospective clients,
- Defining an opportunity to sell to them,
- Quantifying the value of the sales opportunity,
- Tracking progress through the steps in the sales process, and

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Having visibility into

- The amount of potential sales,
- The likelihood of completing the sales, and
- The approximate schedule for completing the process and receiving revenue from the sale.

Schedule -

The list of all Milestones and their due dates. Provides a calendar view of the project.

Tasks -

The smallest unit of work. This is typically work that is completed by a single person or in a single session.

Users -

The people on your team who will use the tool.

Work Breakdown Structure - WBS -

This is a project management tool referring to organizing projects into big sections (Milestones) then into groups of tasks (Activities) and then Tasks