

CRM COMPARISON WORKSHEET



Evaluating your options? Use this worksheet to compare the features and benefits offered by ZohoOne and competing CRM solutions.

CRM Benefits		ZohoOne	Current contact management solution	Other CRM
CONTACT MANAGEMENT	Does the CRM offer unlimited contact records in all subscriptions?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer unlimited data storage in all subscriptions?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you quickly and easily import contacts from email, spreadsheets, and other CRMs?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you add new contacts by scanning business cards from your mobile phone?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM automatically populate information about new contacts from their social media channels?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you find people and companies in the CRM even when your search terms aren't an exact match?	X	<input type="checkbox"/>	<input type="checkbox"/>
TASK MANAGEMENT	Does the CRM provide a daily summary of everything you need to do that day?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you set up recurring tasks and reminders in the CRM?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM integrate with your Gmail or Office 365 calendar, so you can see your upcoming appointments in both places?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM automatically log your emails, phone calls, and internal notes with team members?	X	<input type="checkbox"/>	<input type="checkbox"/>
PIPELINE MANAGEMENT	Does the CRM allow you to filter and view your leads by value, assignee, age of the lead, stage, confidence, and other attributes?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer an interactive map to view and filter your leads geographically?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer a drag-and-drop board so you can quickly view the status of your leads and move deals between stages?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM automatically advance leads between stages when stage goals are met?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you configure multiple pipelines to manage distinctly different sales efforts?	X	<input type="checkbox"/>	<input type="checkbox"/>
REPORTS	Which reports are included with the CRM out of the box?	Sales, Forecast, New leads, Losses, Activity, Funnel, Snapshots, Wallboard		
	Can you create custom reports to view your sales by product, lead source, territory, etc.?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you save and download the reports for easy sharing?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you customize your dashboard to display important stats like your pipeline health, quota progress, and team leaderboard?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Are reports included in the price of the CRM subscription?	X	<input type="checkbox"/>	<input type="checkbox"/>

CRM Benefits

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COMMUNICATION FEATURES	Can you tag your team members to share information and request assistance?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you sync your email account to send emails directly from your CRM?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer two-way sync with Gmail and Office 365, so that any messages sent or received from your email software are automatically attached to the right contacts?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you place domestic or international phone calls directly from the CRM for free?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you create email templates and share them with your team members?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you mass-email a filtered list of contacts with a single click?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you create personal email sequences that deploy until your contact replies?	X	<input type="checkbox"/>	<input type="checkbox"/>
SALES AUTOMATION	Does the CRM guide you through building a sales process if you don't have one?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can the CRM automatically assign leads to reps and distribute leads into the correct pipelines, based on the criteria you set?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM automatically assign tasks to your reps based on what needs to happen next on a given lead?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM automatically subscribe and unsubscribe leads to marketing email lists depending on where they are in your sales process?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM allow you to create and automate follow-through tasks for leads that are won, lost, or cancelled?	X	<input type="checkbox"/>	<input type="checkbox"/>
SETUP AND MAINTENANCE	Does the CRM Offer Training?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Is there support for setup?	X	<input type="checkbox"/>	<input type="checkbox"/>
	About how long does the onboarding process take?	No	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM require an on-site admin or IT department to manage it?	NO	<input type="checkbox"/>	<input type="checkbox"/>
TECHNICAL SUPPORT	Does the CRM offer free phone support?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer live chat support?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer email support?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM offer an up-to-date help center and user forums?	X	<input type="checkbox"/>	<input type="checkbox"/>
MOBILE CAPABILITIES	Does the CRM offer native iPhone and Android apps at no additional charge?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Can you access all your contacts and deals from your smartphone?	X	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM send you mobile alerts when you're tagged in a conversation?	X	<input type="checkbox"/>	<input type="checkbox"/>
INTEGRATIONS	Does the CRM offer Chrome and Outlook extensions so you can manage contacts and leads from your email inbox?	See Integrations	<input type="checkbox"/>	<input type="checkbox"/>
	Does the CRM integrate with the business software tools you rely on the most?	See Integrations	<input type="checkbox"/>	<input type="checkbox"/>



ZohoOne Ready to take a look? Start your **14-day free trial** now!