**BPA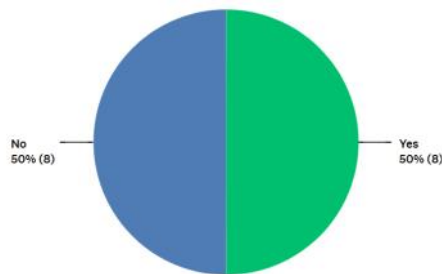P Distribution & Response:** The question was distributed to 39 BPAB members and 16 executed the survey for a 41% response rate.

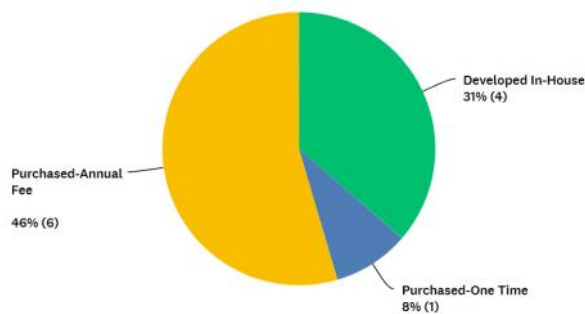Following are results of questions asked, and additional comments, if any.     BACK TO TOP

## BPAB
### Best Practices Advisory Board

**Do you currently use some type of Customer Relationship Management (CRM) system to communicate with clients, prospects, stakeholders, etc?**



No 50% (8)     Yes 50% (8)

**What type of system is it?**



Developed In-House 31% (4)
Purchased-Annual Fee 46% (6)
Purchased-One Time 8% (1)

**What CRM system do you use?**

- Email, texts, some social media, in-person visits, and telephone calls, and regular mail (2)
- Card collection / Outlook; In-house Excel (4); ACT (2); Salesforce(2); MS Access (2); OctoUX with HubSpot (2)
- Our Chamber is using ZOHO. The ED Dept. would like access but the cost is $1,000 / month and we're not sure it's cost-effective right now
- After unsuccessfully trying both Salesforce and Executive Pulse, we decided to simply track our projects using Microsoft Excel. We're willing to share our simple, eleven column spreadsheet, simply go to this Dropbox link: https://www.dropbox.com/s/3k6ofwsa4jgcjjf/League%20City%20Project%20CRM%20Teamplate.xlsx?dl=0)
- I use Evernote extensively for tracking projects. My use has grown organically when I ran into limitations using other software. Love being able to save data, info, files, etc. into a note or notebooks but it can get out of hand quickly if you don't be careful.

**How would you rate the effectiveness of these CRM providers / products? (Only rate those you have used)**



Legend: ■ Excellent  ■ Good  ■ Average  ■ Below Average  ■ Poor
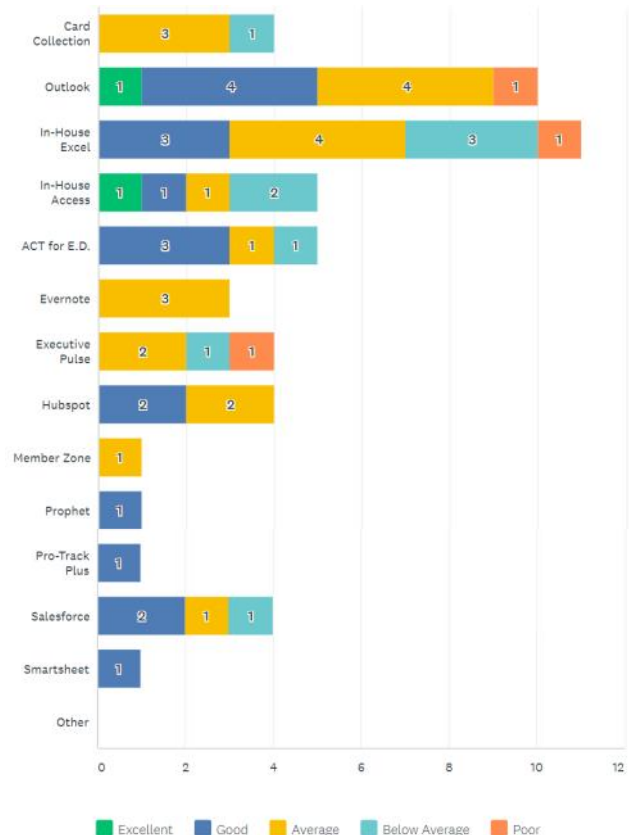
- To me, some have too many bells and whistles. I wanted a simple and affordable one that I could easily input contacts, utilize fields and categories, be able to add notes and alerts and be able to easily export and import my contacts into other programs (constant contact, wix, etc.)
- I used PipeDrive in 2018 and ZoHo in 2019. I prefer Zoho, although PipeDrive was very effective.
- Salesforce was too complicated for us to use. We could never get over the education / training hump to learn how to use it to justify the time to learn it and the expense to maintain / keep it.
- Hubspot helps you with email lists. It is capped at the number of names you can have without paying extra.

**Comments continued from prior page:**

- ACT works fine for what we do with it. There are features we don't utilize, but should.

- We never felt comfortable with storing all our records in only Executive Pulse (i.e. one location). Therefore, using Executive Pulse seemed redundant, since we were storing records both in Executive Pulse and our primary folders at City Hall.

- My use of HubSpot was possibly limited because we don't have Outlook 365. However, not being able to send versatile messages on the fly to prospects / contacts while via mobile greatly limited my ability to use, and integrate, the platform consistently.

- Developing your own dbase in Access has lots of advantages: No annual cost, easy to set up, can import / export current contacts in Excel, can be tailored to your needs, can export for Constant Contact, not overwhelming to learn or use. It is a contacts database though, and not a project tracker.

**What recommendations would you have for an EDO evaluating what kind of CRM to implement?**

- Don't "overbuy" in terms of software. Look for CRM that won't need too much customization.

- Take advantage of their free trials, watch their tutorials and input 10 to 20 contacts into their programs to see how they really work. Also, knowing someone that also uses the program and is willing to help you learn is super helpful.

- (1) Use a CRM tool which is simple to learn AND use, (2) A CRM tool should be resource-effective in terms of both TIME and EXPENSE. In other words, the time required to learn AND use the tool, plus the value of the tool to the organization should justify the COST / EXPENSE of using the tool, (3) The CRM tool you choose should work for you and the end result that you're trying to achieve, (4) Make sure that you can easily and quickly update the CRM tool to update project details, (5) Make sure that the CRM tool will allow you to quickly and easily print/share Summary Active Project Reports.

- I'm cancelling hubspot and may consider Pro-Track Plus in the near future

- Look at large your data base is, as well as how may campaigns you will do and apply the costs.

- Explore exactly what you intend to do with the CRM. They all excel in different things, so do your research. Test drive them before you buy.

- Figure out what level of sophistication you think you need. Prioritize the functions you want most and compare them with several products. Ask around for feedback. If you are not currently using some kind of system, you need to start. It makes a huge difference.

- Keep in mind security (i.e. NDAs) and visibility internally to various groups.

- Ease of use and ability to customize. Really think through what end-result you are seeking.

- Cost may be a factor for some organizations.

- Pay close attention to implementation consultants and choose one who has experience with economic development so they better understand how to build a platform that works for your unique needs.