


# CRM Comparison Worksheet



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

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

# CRM Benefits

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

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