

CRM Selection Guide

Choose the Right CRM the First Time

Switching CRMs after you've built your business around one is expensive, painful, and avoidable. I've helped 50+ businesses navigate this decision — here's what actually matters.

Nicole's take: Most business owners pick a CRM based on which one they've heard of, or which has the flashiest ad. That's exactly backwards. At Certified Tech Solutions, we evaluate CRMs based on your specific business model, team size, and growth goals. Automation on a Mission (AOAM) is our primary recommendation for most small businesses because it replaces the CRM plus 8–10 other tools in one platform.

Step 1: Define Your Actual Problem

Start with your pain point — not a feature list:

- **Leads going cold:** You need pipeline views and automated follow-up sequences.
- **Communication scattered everywhere:** You need centralized contact records with full history.
- **Manual, repetitive admin:** You need workflow automation built in or tightly integrated.
- **No revenue visibility:** You need deal tracking, forecasting, and reporting.
- **Too many disconnected tools:** You need an all-in-one or a CRM with strong native integrations.

Step 2: Know Your Business Profile

Answer these before looking at any software:

Your Situation	Options
Active contacts right now?	Under 500 / 500–5,000 / 5,000+
Team size?	Solo / 2–5 people / 5+ people
Sales process complexity?	Simple 1–2 steps / Multi-stage pipeline
Tools you're already using?	List them — CRM must integrate with all of these
Monthly budget?	\$0 / Under \$50 / \$50–\$200 / \$200+ (AOAM starts at \$127/mo)

Tech comfort level?	Beginner / Intermediate / Advanced
Need a nonprofit discount?	CTS offers nonprofit pricing — ask Nicole directly

Step 3: The 7 Features That Actually Matter

1. Contact & Deal Management

Full interaction history at a glance, custom pipelines, lead tagging — this is the core.

2. Pipeline Visibility

Visual board showing exactly where every prospect is in your sales process at all times.

3. Automated Follow-up

Does it remind you — or automatically reach out — when leads go quiet for X days?

4. Email + SMS Built In

Native two-way messaging without a third-party integration keeps your data clean.

5. Reporting & Dashboards

Conversion rates, revenue forecasts, and team activity — all visible without exports.

6. Integration Ecosystem

Connects to your scheduler, payment processor, and accounting tool natively.

7. Mobile Experience

Your team won't use a CRM that's painful on their phones. Test this before buying.

CRM Comparison Matrix

Score each option 1–5 per factor. Multiply by weight. Highest score wins.

Factor	Weight	Option 1	Option 2	AOAM
Ease of use	20%	___ /5	___ /5	___ /5
Pipeline management	15%	___ /5	___ /5	___ /5
Automation depth	20%	___ /5	___ /5	___ /5
Email/SMS integration	15%	___ /5	___ /5	___ /5
Reporting quality	10%	___ /5	___ /5	___ /5
Integration options	10%	___ /5	___ /5	___ /5
Price & value	10%	___ /5	___ /5	___ /5
TOTAL	100%			

Red Flags — Walk Away If You See These

- No free trial or live demo available.
- Per-user pricing that compounds as your team grows.
- Poor mobile app — your team will avoid using it.
- No native email/SMS — that's another integration to maintain.
- Data locked in: if you can't export your contacts cleanly, you're captive.
- Hidden onboarding or migration fees.

Questions to Ask in Every Demo

- Show me a contact record with full communication history.
- How does the system handle a lead that goes quiet for 30 days?
- What does migration from my current tool look like?
- What's your average time-to-onboarded for a business my size?
- What does support look like when something breaks on a Friday afternoon?

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Ready to take the next step? Not sure which CRM fits your business model? Certified Tech Solutions evaluates, recommends, and fully implements your CRM — including data migration and team training. We never recommend a tool we haven't used ourselves. Visit ctsolutionsonline.com/contact or take the free Tech Chaos → CALM™ Survey at ctsolutionsonline.com/chaos-to-calm-score