

Manage Your Customers & Contacts

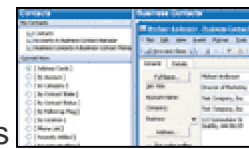
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By John Clyman

Serving return customers is almost always more profitable than acquiring new ones; so it pays to treat your clients well. Although the financial packages we mentioned often provide basic capabilities for tracking customer information, many companies can benefit from a more focused customer relationship management (CRM) product.

Microsoft Outlook provides basic contact management capabilities in its address book, and you can share a centralized contact list if you're running Microsoft Exchange server or its equivalent. But most businesses are likely to want something more sophisticated. One option to consider is the Microsoft Outlook Business Contact Manager (included with Microsoft Office Professional Edition and Small Business Edition 2003). The Business Contact Manager integrates into Outlook 2003, appearing as another contact list beside your



MS Outlook Business Contact Manager

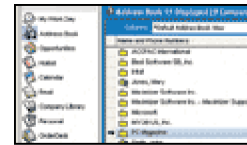
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standard Outlook contacts. It lets you track contacts and accounts, log phone calls and other interactions, manage opportunities in your sales pipeline, and run a variety of reports. It's not a bad start, though it does suffer from feeling like the Outlook plug-in that it is, rather than a purpose-built application. (Microsoft Corp., www.microsoft.com ●●●○○)

Standalone contact managers include FrontRange Solutions' GoldMine 6.5 (\$199 list). GoldMine lets you track detailed information about your contacts, schedule appointments or actions for those contacts, and track when the assigned tasks have been completed. Each user has a My GoldMine page, a personal portal showing daily activities, e-mail inbox, recently updated contacts, and the contents of any RSS feeds you choose to include. One caveat: GoldMine's interface can be confusing at times. GoldMine is available in a variety of additional flavors, including a corporate version (\$495) that links to Outlook and Microsoft Exchange Server. And an iGoldMine add-on (\$295 per concurrent user) lets you access info over the Web. (FrontRange Solutions Inc., www.frontrange.com ●●●○○)

Although Best Software's Act! contact manager has long provided basic CRM capabilities, the new ACT! 2005 Premium for Workgroups (\$399.99 list) takes a big step forward with support for tracking and forecasting sales opportunities and other features. The new edition supports companies as a native data type, provides better activity and calendar management, and offers additional field types and customization (Best Software SB Inc., www.act.com ●●●●○○).

Maximizer 8 (\$159 direct) lets you keep track of both individuals and companies using a clear, list-based interface. You can also enter opportunities, schedule meetings, track documents, and keep a hot list of key tasks (Maximizer Software Inc., www.maximizer.com Half Stars: ●●●●○).



Maximizer 8

CRM is one of the areas where Web-based products have become particularly appealing. The best of the so-called "on-demand" CRM systems available today is salesforce.com Professional Edition (\$65 per user per month). Salesforce.com provides all the tools you need for tracking leads and customers, keeping track of shared activities, reporting on your sales pipeline, centralizing document management, and more. It's both easy to use and highly customizable. Also available are the stripped-down salesforce.com Team Edition (up to 5 users, \$995) and a free, single-user Personal Edition (salesforce.com inc., www.salesforce.com. Professional Edition Half Stars: ●●●●○).

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NetSuite Small Business (\$99 per month for the first user, \$49 per month per additional user) also provides Web-based CRM capabilities, but it really sets its aim on much broader goals, offering back-end database, accounting, Web site management and analysis, and human resources features as well. NetSuite's all-in-one approach and comprehensive dashboards may appeal to companies that don't want to assemble multiple software products, though its interface can be a bit intimidating compared with more specialized packages (NetSuite Inc., www.netsuite.com ●●●●○).



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