



CUSTOMER
RELATIONSHIP
MANAGEMENT

BEST PRACTICES FOR CRM SUCCESS



PRESTAMOS CDFI
A DIVISION OF CHICANOS POR LA CAUSA

PRE
SEN
TED
BY



**ALEX
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Business
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Program
Manager

WHO IS PRESTAMOS CDFI?

- Prestamos is a division of Chicanos Por La Causa (CPLC), since 1980.
 - Chicanos Por La Causa is a leading Hispanic nonprofit in the United States since 1969.
- Prestamos CDFI (Community Development Financial Institution) and CDE (Community Development Entity)
- Prestamos CDFI is the Economic Development and Small Business Growth branch of CPLC.



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ALL QUESTIONS ARE
WELCOME

Type in your questions and we will
answer them at the end of the
presentation.

COPY OF THE PRESENTATION

Feel free to request a copy of the
presentation by emailing
alex.magallanes@cplc.org



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HOUSEKEEPING ITEMS

TODAY'S AGENDA



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WHAT IS A CRM?

Understanding the basics of a CRM

WHY USE A CRM?

Understanding the importance of using a CRM

WHEN TO USE A CRM

Is a CRM for everyone?

WHAT CRM OPTIONS ARE THERE?

A review of the top 5 CRMs for 2022

OTHER RESOURCES

Prestamos CDFI
SBA PRIME

Q&A

Time to answer questions!

WHAT IS A CRM?



It is a Customer Relationship
Management system

A CRM SHOULD...

- Come with a variety of different features and tools
- Benefit your specific business type and model, your goals, and the sector you operate in
- Streamline processes and improve the service your business offers

knowledge, benefit
sales, information
customer, product
marketing, quality
decision, analysis
+ solution, enterprise

CRM

WHY USE A CRM?



BECAUSE A CRM ALLOWS YOU TO...

- Keep and maintain the existing customer relationships
- Start new relationships with new customers
- Create a repeatable, client-based sales process
- Build integrations and automation with your other business processes and systems
- Provide great customer service

TAKE NOTE



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Should I use a CRM? When is a good time to use one

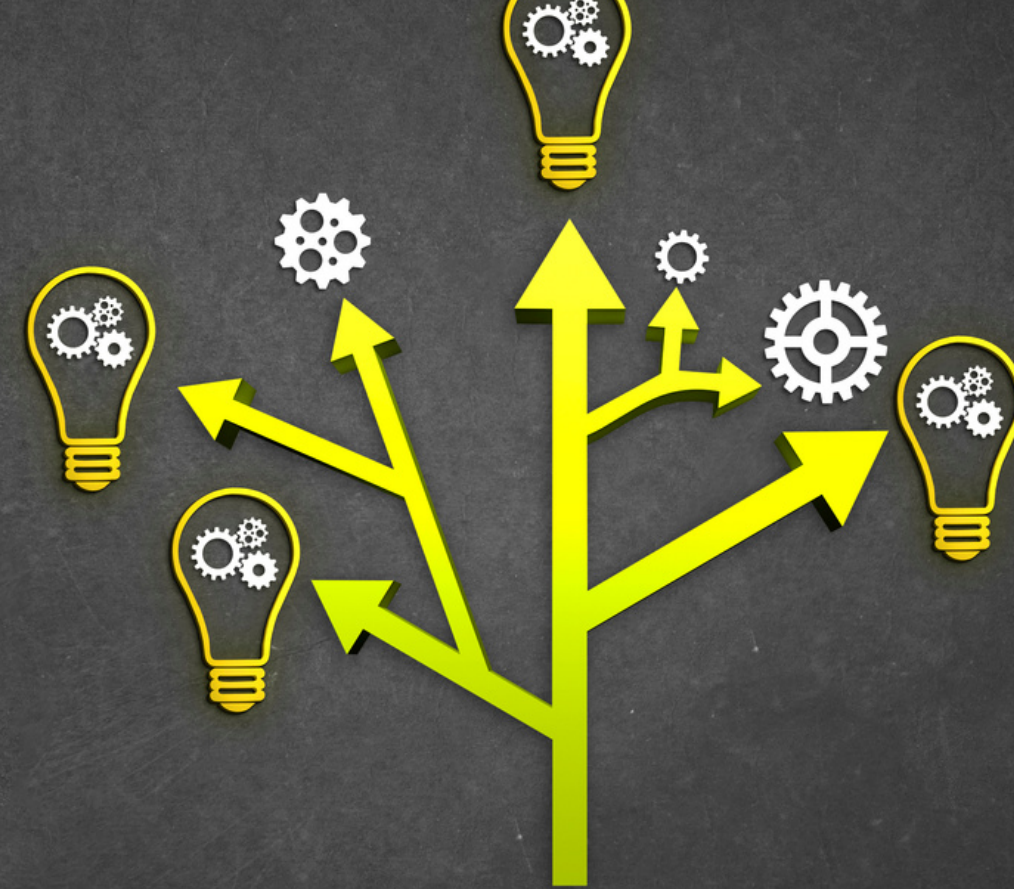


NOW

- Not having customer data in one single database can be chaotic
- You could be losing \$\$\$ in sales by failing to establish sales processes
- If customers are forced to repeat themselves every time they contact you, they may not contact you at all next time
- Avoid growing pains by building workflows, contracts, invoices, customer service protocols, etc.

WHAT OPTIONS ARE THERE?

TOP 5 CRMs in 2022



Explore your Options



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- Salesforce
- Freshsales
- Zoho
- HubSpot
- Streak



salesforce

SPECIFICATIONS

Price: From
\$25/user/month

Free Plan: No

Trial: 30 days

Support: Email
ticketing and phone

REASONS TO BUY

- Advanced customization
- Small business pricing available
- Long trial period

REASONS TO AVOID

- Typically more expensive than competitors
- No free plan available



SPECIFICATIONS

Price: From
\$15/user/month

Free Plan: Yes

Trial: 21 days

Support: Phone and
email

REASONS TO BUY

- Free plan available
- Clear, intuitive dashboard
- Customizable web forms for website data capture

REASONS TO AVOID

- Limited lead generation tools
- Limited third-party integrations



SPECIFICATIONS

Price: From
\$14/user/month

Free Plan: Yes

Trial: 15 days

Support: Email

REASONS TO BUY

- Easily integrates with other Zoho tools
- Great for lead capturing
- Simple to use

REASONS TO AVOID

- Paid plans can be pricey
- Support only available Mon-Fri



SPECIFICATIONS

Price: From \$45/2 users/month

Free Plan: Yes

Trial: 14 days

Support: Live chat, phone,
online meeting

REASONS TO BUY

- Free-forever plan available
- Hundreds of app integrations
- Easy to understand

REASONS TO AVOID

- Expensive premium plans



Streak



SPECIFICATIONS

Price: From
\$15/user/month

Free Plan: Yes

Trial: 14 days

Support: Email, with
priority support for
Enterprise plans

REASONS TO BUY

- Built into Gmail
- Free plan
available
- Simple to import
and export data

REASONS TO AVOID

- Expensive for
larger teams

RESOURCES & Q&A

UPCOMING EVENTS

PrestamosLoans.org/events

NO-COST 1:1 BUSINESS ADVISORS

PrestamosLoans.org/business-empowerment-services

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BUSINESS FINANCING

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THANK YOU!



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