CRM from sratch

https://www.cleveroad.com/blog/how-to-build-your-own-crm-system-avoiding-common-mistakes

# Type of CRM:

### \*1.Operational

### 2.Analytical

### 3.Collaborative

# Must have CRM features:

### \*1.Manage Contacts

### 2.Set Reminders

### 3.Edit Calanders

### 4.Manage Tasks

### 5.Generate Reports

# Key feartures of CRM:

## 1.Touchpoint tracking:

Track the communication between company’s representatives and clients

## 2.Email marketing:

## 3.File sharing

## 4.Mobile version

## 5.Pipeline view:

Allows you to track all sales processes

## 6. Invoicing:

### Searchable invoice history

### Quick invoices to clients

### Status tracking

## 7. Integration with social media

## 8. Reports:

Custom reporting

# Advanced:

### Integration with third-parties

### Unity with other internally created software

### Call center management

### Tracking referrals

### Customer scoring

### Chatbots

Things to Consider Before You Build a CRM from Scratch :

# 1.Set of Features:

Set clear goals for your CRM, identify features, and tell about your expectations on how it should simplify business processes in a company. In the ideal world, all this should be documented and handed to your software engineers.

# 2.CRM Roles

It’s a good idea to create a breakdown by roles in the CRM (marketing, sales, support). Employees of each role will have access to certain functionality as well as information.

# 3.SaaS Platform vs. Internal Software

If you have any intention to turn your custom-built CRM into a software as a service in the future, you should start preparing tech background for this from the very first iteration of the product development.