Pitman Training Group – CRM Business Case

Pitman CRM Implementation

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ABOUT THIS DOCUMENT

Document purpose	The purpose of this document is to outline the imperative transition from Excel-based processes to the implementation of a Customer Relationship Management (CRM) system within Pitman Training. It serves as a comprehensive guide that elucidates the compelling reasons for this strategic shift, emphasizing the potential benefits, core objectives, and anticipated outcomes associated with CRM adoption. This document is intended to serve as an essential reference point for stakeholders, decision-makers, and project teams, providing a clear understanding of the necessity, advantages, and strategic significance of embracing CRM technology as a pivotal tool for enhancing customer interactions, optimizing operational efficiency, and facilitating sustainable business growth at Pitman Training.
Intended audience	Pitman Training Stakeholders
Scope	To help deliver a fully integrated CRM within 3 months
Integrated CRM	- https://hevodata.com/learn/salesforce-crm/ - https://www.emailcrush.com/mailchimp-overview/ - https://cargas.com/software/salesforce-crm/ - https://www.salesforce.com/uk/editions-pricing/sales-cloud/ - https://www.ventureharbour.com/salesforce-review/ - https://cynoteck.com/blog-post/salesforce-pros-and-cons/ - https://www.rockstarmarketing.co.uk/what-is-activecampaign/ - https://store.outrightcrm.com/blog/what-is-mailchimp-software-and-how-does-mailchimp-work/ - https://www.trustradius.com/products/activecampaign/reviews#comparisons - https://www.emailvendorselection.com/activecampaign-crm/ - https://moosend.com/blog/mailchimp-review/ - https://crm.org/news/mailchimp-review - https://zapier.com/blog/why-is-mailchimp-so-popular/ - https://ellinke.com/the-best-marketing-automation-software-comparing-pardot-activecampaign-and-hubspot/ - https://adynamics.com.my/crm/benefits/ - https://www.businessnewsdaily.com/15963-benefits-of-crm.html - https://www.techtarget.com/searchcustomerexperience/definition/CRM-customer-relationship-management

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Date	Description of Change	Author	Version No.
07/09/2023	First Draft	Himangi Rathore	0.1

Date	Document	Reviewer / Approver	Version No.

EXECUTIVE SUMMARY

About Pitman

Pitman Training has led the way for growth in development and efficiency within the workplace since 1837 – when Sir Isaac Pitman invented Shorthand. Since then the business has developed to incorporate modern technologies and advances. Keeping true to the heritage of the brand, the key focus is to arm our students with the skills they need to get the jobs that they want.

Pitman Training Group is a well-established education and training provider with a global presence, specializing in career-focused training and development programs. Founded in 1837 by Sir Isaac Pitman, the company has a rich history of delivering high-quality education and skills development to individuals and businesses.

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The company has hired Robson Moore to help deliver a fully integrated CRM within 3 months.

The company has never previously used a customer relationship management (CRM) tool. They currently use Excel to hold all their company data. They are looking to implement a CRM and integrate it into a new landing page to help generate additional revenue.

Using spreadsheets, such as Excel, to manage all company data lead to several business problems which are listed below –

1. Data Management and Integrity
2. Limited Collaboration
3. Data Security and Compliance
4. Inefficient Processes
5. Customer Retention and Loyalty
6. Training and Adoption
7. Cost and ROI Concerns

The Benefits of using CRM

1. Centralized Data Management
2. Improved Customer Engagement
3. Efficient Lead Management
4. Enhanced Customer Support
5. Data Security and Compliance
6. Competitive Advantage
7. Customer Retention

Identified 3 possible CRM solutions for Pitman to consider which are further discussed based on features, benefits, Pros & cons and pricing.

The recommendation has been provided at the end of the Business Case.

1. Salesforce

2. MailChimp

3. Active Campaign

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Pitman Training Group is likely to continue evolving to meet the changing needs of learners and the job market. Embracing new technologies, expanding their course offerings, and strengthening their global presence will be key strategies for sustaining growth and success in the education and training sector.

Transitioning from using spreadsheets to implementing a Customer Relationship Management (CRM) tool can be a significant change for Pitman Training Group.

This might involve data migration, staff training, process redesign, and ongoing monitoring and optimization to ensure that the CRM system effectively supports their customer relationship management efforts.

Listed below top 5 business concerns using spreadsheets, such as SpreadSheets, to manage all company data which can lead to several business problems and challenges:

Ref	Business Concern	Description
1	Data Disorganization	Spreadsheets can quickly become disorganized as data grows, making it challenging to find and update information. Lack of standardized data entry can result in inconsistencies.
2	Inefficient Reporting	Creating comprehensive reports or analyses from multiple spreadsheets can be time-consuming and prone to errors. It may require manual data consolidation and manipulation.
3	Data Security Risks	Spreadsheets may lack robust security measures, making sensitive data vulnerable to unauthorized access or data breaches.
4	Difficulty in Data Analysis	Spreadsheets have limited data analysis capabilities compared to dedicated data analysis tools or databases.

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		Advanced analysis and data visualization may be challenging.
5	Compliance Challenges	Meeting regulatory requirements (e.g., GDPR, HIPAA) for data protection and privacy can be complex when using spreadsheets, potentially leading to compliance issues.

PROPOSAL

The project sponsors will require the BA's to further explore the above options and create a business case for the benefit of senior stakeholders.

Budget

£97k - this budget will consider Robson Moore's expenses and any cost of development.

Contacts

Pitman currently has an email list of 27,321 – expected to grow to 35,000 by later this year.

Users

Pitman expects 2 marketing experts, 6 sales staff and 2 managers to use the CRM so 10 users in total.

PITMAN CRM IMPLEMENTATION BENEFITS

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- Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth. CRM systems compile customer data across different channels, or points of contact, between the customer and the company, which could include the company's website, telephone, live chat, direct mail, marketing materials and social networks. CRM systems can also give customer-facing staff members detailed information on customers' personal information, purchase history, buying preferences and concerns.

- Implementing a Customer Relationship Management (CRM) system can offer numerous benefits to a company like **Pitman Training**, which specializes in education and training services.

- **Pitman Training Group may** consider transitioning to a more robust data management solution, such as a Customer Relationship Management (CRM) system or a dedicated database, to improve data accuracy, security, accessibility, and overall efficiency in their operations.

- Customer relationship management (CRM) software has become a near-vital tool for businesses of all sizes. CRM software can provide several benefits to any business, from organizing contacts to automating key tasks. It can also be a centralized, organized hub that enables consistent communication both with customers and within the organization. This is especially important as more organizations shift to remote work.

Listed below are the top 5 main benefits of using CRM.

Feature	Benefit

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Centralized Data from Different Departments	Data is a necessary part of business, and it's available from several resources or departments.
	A CRM system helps you go deeper with all your data and metrics, including those from other departments.
	When your company is dedicated to maintaining clean data, or data free from errors, you can use your CRM platform to collate, tabulate, and organise that data, which is then easy to interpret with reporting features. This is one of the biggest benefits of a CRM system.
	However, only very few companies can leverage customer data to their own benefit. According to Forbes, 87% of executives are not highly confident they are leveraging all available customer data.
	And one of the reasons why it is so difficult to leverage customer data is that in most cases, departments are using different tools to manage day-to-day tasks. Often this not only causes a departmental disconnection but also between individuals in the same department as well. CRM system is that it helps you to remove the number of applications each department uses which helps to keep your data in one place and it creates a centralized hub of your marketing, sales, field service, and customer service data that pulls data from second and third-party tools which enables you to get a 360-degree view of your customer data.
Sales Spend Less Time on Administrative Tasks	Another great benefit of using a CRM system is salespeople spend less time on administrative tasks and more on selling.
	Administration tasks are a necessary evil for every salesperson so important data can be recorded and use to make decisions that positively impact the business bottom line. In fact, two-thirds (64.8%) of reps' time, on average, is spent in non-revenue-generating activities, leaving only 35.2% for functions related to selling.
	And that's where CRM can help free some of the time from non-selling and administration activities, so the salespeople can more focus on selling and nurturing relationships with their customers.
	CRM can help salespeople spend less time on non-sales tasks like data entry, creating reports, sharing information, providing intelligent notification, and creating workflows that essential ease the burden of administrative tasks.

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	Also helps standardize a lot of your sales processes and then create automation and workflow to simplify or reduce any manual works such as sending follows up, demo requests, or product information.
Easily Track Customer Interactions	CRM systems enable companies such as a Pitman Training to track and manage customer interactions, making it easier to provide personalized experiences, follow up on inquiries, and maintain ongoing communication. Understanding how customers became customers helps companies make better acquisition decisions. Before your customer bought your product or service, they went through what we call a customer journey. Tracking your customer interaction from the first touchpoint all the way to the end of the customer lifecycle allows you to learn a lot about how you are driving new customers, what channels are the most effective, and how you should navigate potential leads down the funnel so they can become customers. And CRM system allows you to easily track customer touchpoints across channels and analyze those data to create your own, personalized customer journey.
Improve Your Customer Satisfaction	Customer satisfaction has been arguably one of the most important topics in every business industry. Almost all businesses have acknowledged the importance of happy customers, happy business. At times, when customers are having plenty of choices to choose from, we are living in a world, where a customer oversees our business success. Therefore, customer satisfaction has become ever more important. A CRM system with the right strategies will help you to unlock more customer-centric, streamlined processes and insights that lead to higher customer satisfaction. **With a CRM system, Pitman Training can provide better customer support by tracking and resolving issues promptly, managing service tickets, and maintaining a comprehensive knowledge base for support teams.** CRM system helps boost team efficiency by eliminating repetitive tasks, letting your team focus on high-impact activities.

	CRM system also helps you to connect with your customer wherever they are, whether it is live chat, calls, email, or social media, CRM system helps you to connect across platforms. Lastly, I want to mention, CRM solutions help you offer great customer service—helping build the trust and loyalty that keeps your customers coming back.
Scale Your Processes as Company Grows	Another great benefit of a CRM system is it allows you to scale your processes as your company grows. As your company grows, hiring more people, targeting across more channels and increasing campaign budgets there needs to be a way for your workforce to effectively work and do more with less. The goal of a modern CRM system is to be your process management tool that allows you to create workflows and automate tedious and repetitive tasks while keeping consistency in delivery and quality. **As Pitman Training expands, CRM systems can easily scale to accommodate more customers, leads, and interactions without compromising data integrity or efficiency.** Lastly, I want to mention, the CRM system helps you to effectively manage your growing list of customers by allowing you to effectively manage multiple channels at once, respond to your customers' inquiries faster, and provide the tools so your employees can live up to the expectations.

SOLUTION OPTIONS

Option One

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About

Salesforce Customer 360 is the world's #1 CRM. Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales operations, and marketing campaigns. Salesforce CRM is a suite of connected apps that work together to provide a powerful CRM platform for your sales, marketing, and service teams. The Salesforce Sales Cloud brings all your sales information together in one place, boosts productivity by automating daily sales tasks, and helps you forecast more accurately with revenue intelligence. The cloud platform makes it easy for your team to work together from anywhere. Industry experts like Gartner and Forrester consistently rate Salesforce a leader in CRM software.

Dashboard

Features

Pitman CRM Implementation

With Salesforce CRM's sales and marketing features, you can keep track of every customer interaction, automate daily tasks, and manage your forecasts more accurately.

1. It allows you to build mobile-ready Salesforce apps for every employee. This helps boost productivity and helps build a more connected workforce. Apart from this, it also helps you streamline the employee help desk for faster self-service.

2. Salesforce offers a boost on its core services with additional functionalities such as Application Integration and Artificial Intelligence. This includes building custom-branded mobile apps; easy integration of data from ERP, IoT, and databases; and addition of predictive capabilities to every service and Sales application.

3. You can make your apps more personalized and smarter to meet your needs in real-time engagement, service, and purchase.

4. With Experience Cloud, you can evolve on a fast, flexible platform and maximize your return on experience. It allows you to build stronger relationships with a Single Source of Truth.

5. Salesforce provides a highly curated library of industry-specific expert help. This includes process flows, apps, templates, and components built to tackle every single issue faced by the user.

Salesforce Pros & Cons

Pros

1. Incredibly powerful CRM platform
2. You can add/remove features to suit your needs.
3. As the most popular CRM platform, it's easy to find sales reps who know how to use the software.

Cons

4. Expensive
5. You must pay for add-ons to get the most out of the software.
6. Configuration and setup are complex and time-consuming.
7. Cluttered interface makes navigation and simple tasks unnecessarily complex.
8. The learning curve never seems to end.
9. Customer support has a poor reputation.

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Benefits

1. Time Management: Salesforce CRM streamlines your business processes by automating repetitive tasks, allowing your team to focus on more value-added activities. It provides a centralized platform for managing leads, contacts, and opportunities, reducing the time spent on data entry and ensuring that your team can efficiently prioritize and respond to customer needs.

2. Increased Revenue: Salesforce CRM helps boost revenue through its comprehensive sales and marketing capabilities. With improved lead conversion rates and better customer insights, you can increase your sales and revenue.

3. Easy Accessibility: This accessibility ensures that your sales and support teams can be responsive to customer inquiries and collaborate effectively even when working remotely.

4. Enhanced Collaboration: Salesforce fosters collaboration among your team members by providing a unified platform for sharing information, tracking customer interactions, and managing projects. Real-time updates and integrated communication tools make it easy for your employees to work together and provide excellent customer service.

5. Business Scalability: Salesforce CRM is highly scalable, making it suitable for businesses of all sizes.

6. Seamless Integration: Salesforce offers a wide range of integrations with other business tools and applications, allowing you to create a seamless workflow.

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7. Trustworthy Reporting: Salesforce provides robust reporting and analytics capabilities, giving you valuable insights into your business performance. Business analysts can create custom reports and dashboards to track key metrics, monitor sales trends, and make data-driven decisions.

Pricing

Those prices are per user, per month and you'll be charged a lump sum annually. You'll also have to pay for implementing the system and any customisation you require – plus the additional cost of any plugins.

Reality check: Salesforce is going to cost you at least $5,000 for a single user in the first year and you could be paying up to £50,000 per year for a relatively small team.

Salesforce implementation can require anywhere from $5,000 to well over $80,000. The investment a company makes in the implementation is a function of several factors.

TRY FOR FREE	Starter £ 20 GBP/user/month*	Professional £ 64 GBP/user/month*	Enterprise £ 132 GBP/user/month*	Unlimited £ 264 GBP/user/month*
Account, Contact, Lead, and Opportunity Management	✓	✓	✓	✓
Email Integration with Gmail or Outlook	✓	✓	✓	✓
Workflow and Approval Automation	✗	✗	✓	✓
Pipeline and Forecast Management	✗	✓	✓	✓
Sales Engagement and Insights	✗	✗	✗	✓
Sales Insights	✗	✗	✗	✓
Premier Success Plan	✗	✗	✗	✓

Conclusion

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✓ Salesforce is great for features and tailoring a platform to meet your needs, but the setup process can be painful and using the software on day-to-day basis is frustrating.

✓ If usability is something you look for in sales and marketing tools, Salesforce feels like it gets in the way of things more than it empowers you to do more, which is especially difficult to accept at this price point.

✓ Aside from CRM, Salesforce provides several cloud services that can be linked with CRM to improve functionality. It is a very versatile, powerful, and agile system, but it is difficult to set up and manage without the help of skilled in-house experts and consultants. As a result, before initiating a project, you should assess all the risks, costs, and resources involved.

Option Two

About

Mailchimp is an Atlanta-based email marketing service and marketing automation platform.

Founded in 2001, it later extended its services by opening offices in Vancouver, Brooklyn, and Oakland.

Mailchimp is under the parent company, The Rocket Science Group LLC, which is a web design agency that the founders ran before they founded Mailchimp.

The current Mailchimp team is headed by the two major founders, Ben Chestnut (CEO), Mark Armstrong, and Dan Kurzius.

Mailchimp is one of the biggest email marketing providers in the world it provides you with different features so you can send emails to your prospects, customers, and returning buyers. It provides tools for creating and sending email campaigns, managing subscriber lists, and analyzing campaign performance. While Mailchimp offers customer relationship management (CRM)-like features, it's important to note that Mailchimp is not a dedicated CRM platform.

Mailchimp is so much more than a simple autoresponder. It has evolved to become an all-in-one marketing platform that helps SMBs grow faster. Recently, the company has added eCommerce tools, and customer relationship management (CRM) features to its offering. There are also website hosting and design functionalities.

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Dashboard
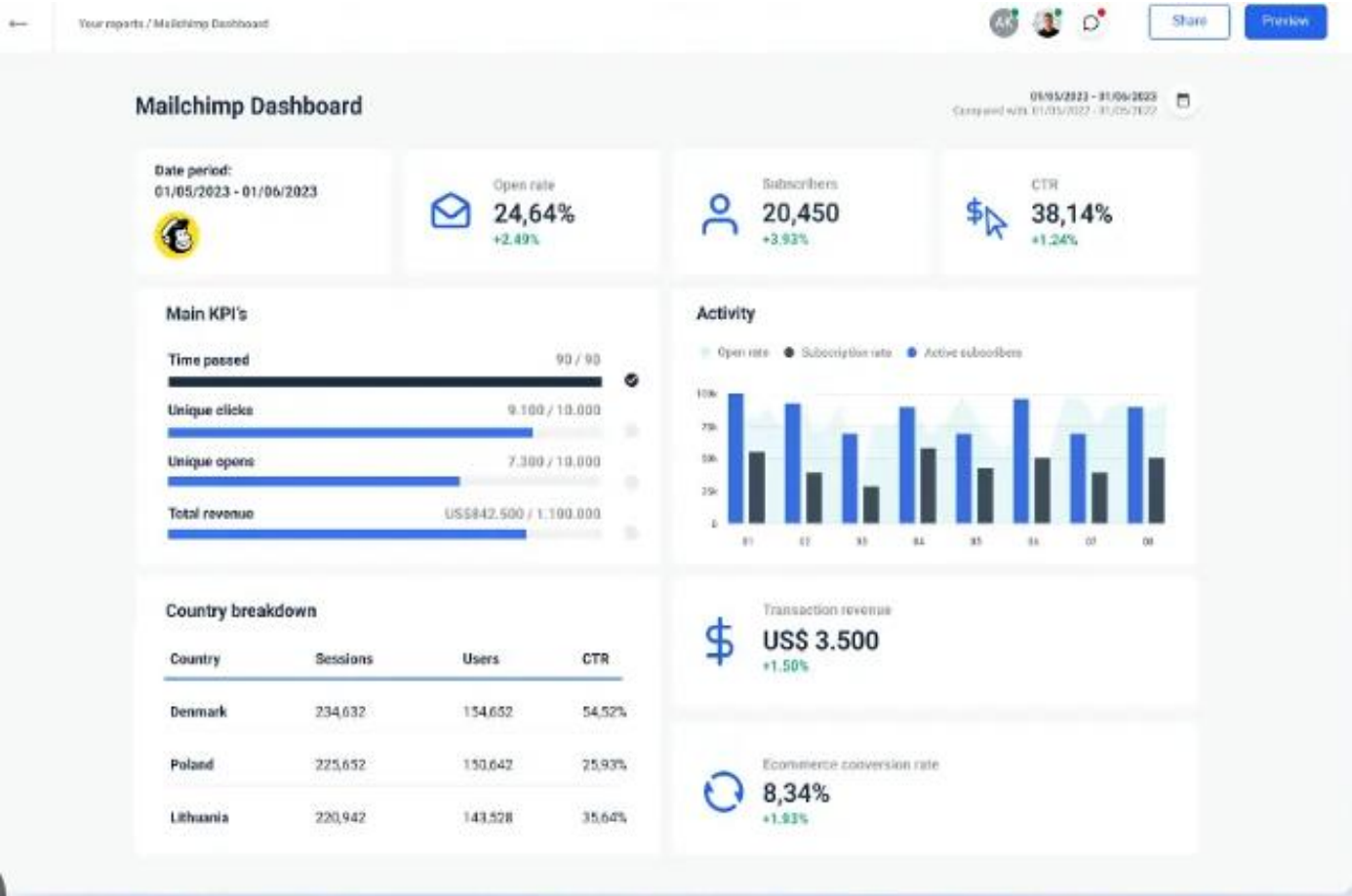
Features

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1. **Audience Management:** Mailchimp allows users to create and manage email lists, known as audiences. While not a full CRM, you can segment your audience based on various criteria like demographics, behavior, and engagement history.

2. **Contact Profiles:** Mailchimp provides contact profiles that include information about each subscriber, such as email address, name, and engagement history. It allows you to store additional data about contacts and track their interactions.

3. **Tagging and Segmentation:** Users can tag contacts and create segments based on specific criteria. This enables you to send targeted email campaigns to different groups within your audience.

4. **Automation Workflows:** Mailchimp offers automation features, including drip campaigns and automated responses triggered by user actions. These workflows can help nurture leads and engage with contacts over time.

5. **Reporting and Analytics:** You can track email campaign performance, including open rates, click-through rates, and conversion rates. This data can provide insights into customer behavior.

6. **Integration:** Mailchimp integrates with various third-party applications and services, including e-commerce platforms, social media, and CRMs. This integration capability allows you to connect Mailchimp to other tools for more comprehensive customer management.

Mailchimp Pros and Cons

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PROS	CONS
EASE OF USE	AFFORDABILITY AND PRICING
EMAIL EDITOR	EMAIL TEMPLATE LIBRARY
MARKETING AUTOMATION	SIGNUP FORMS
SEGMENTATION	LANDING PAGES
PERSONALIZATION	DESIGN & A/B TESTING
ANALYTICS & REPORTING	CUSTOMER SUPPORT
EMAIL DELIVERABILITY	
INTEGRATIONS	

Benefits

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Benefits of the MailChimp platform
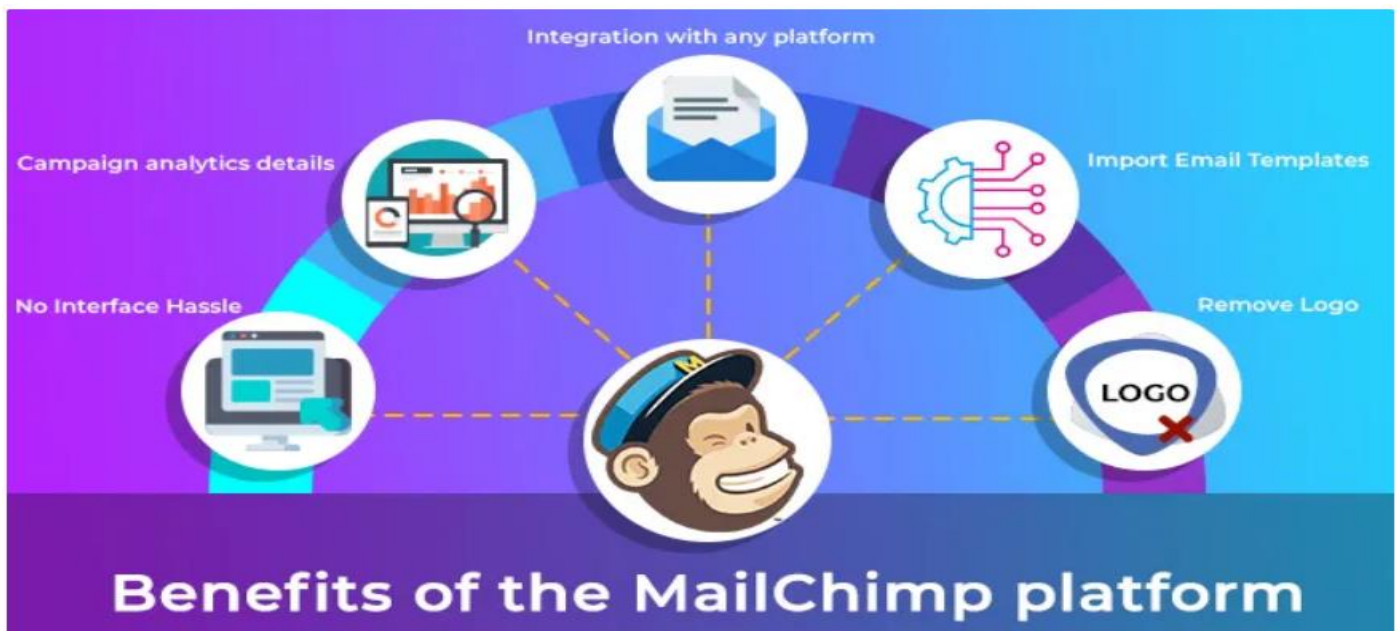
1. **Details of the campaign analytics for your business -** Businesses get to know their results more than what else they need as it is very crucial to get aware of how your campaign performs and whether you get a good result or not for your business. The same goes with the Mailchimp platform if you work here for the email campaign process and after a few days you are very interested in getting information about your efforts then it can inform you.

2. **No such hassle you will face for Interface -** The interface is always important for the users because everyone wants that it should be easy and more importantly well-designed for you because many are novices and have such requirements not to face hurdles. Most of the users strive for software or tool for email marketing where their user interface is customizable.

3. **Businesses can import email templates of their own –** After operating this cloud-based email platform called Mailchimp also offers effective and special templates for your venture to work and send from there.

4. **Significance of Integration in Mailchimp software** - In the growing pace of technology, everyone wants their platform or business should be integrated with other third-party software to ease their efforts. Mailchimp platform can be easily integrated with other third-party applications or software. It can also sync with WordPress, Slack, Zapier, and with many more. There also an extension for this called SuiteCRM Mailchimp Integration which may help you regarding the campaign process.

5. **Chance of removing a logo of Mailchimp -** Many big organizations don't want any logo in their campaign process instead of their own and small or medium-scale businesses that even they don't want the logo should be there. One of the biggest advantages that everyone wants is you can also remove that logo easily from your campaign and subscription form.

Pricing

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One of the major Mailchimp cons is that it can get quite expensive as your email list grows, especially for smaller businesses with tight budgets. The company has recently made slight changes to its pricing plans.

Now, none of their paid plans offer unlimited emails. For example, the lowest paid plan, Essentials, lets you send only up to 10 emails a month per contact. So, if you have a contact list of 20,000 subscribers, you can only send up to 200,000 emails per month. The monthly price goes up as you add more contacts.

If you have 50,000 contacts, the monthly price jumps to $299/month. If you have more than 50,000 contacts, you'll need to subscribe to either the Standard or Premium plan. For 75,000 contacts, the monthly price for the Standard plan jumps to $475/month. If you exceed your monthly limit of contacts and sent emails, Mailchimp will automatically bill you for your overages.

PLAN	Premium	Standard	Essentials	Free
	Advanced features for pros who need more customization.	Better insights for growing businesses that want more customers.	Must-have features for email senders who want added support.	All the basics for businesses that are just getting started.
PRICING	Starting at $299.00 a month	Starting at $14.99 a month	Starting at $9.99 a month	$0
	Select	Select	Select	Get Started
	Select	Select	Select	Get Started
	Calculate your price	Calculate your price	Calculate your price	
TOP FEATURES	Everything in Standard, plus: Advanced segmentation Multivariate testing Unlimited seats and role-based access Phone support	Everything in Essentials, plus: Advanced audience insights Retargeting ads Custom templates Behavioral targeting automation series	Everything in Free, plus: All email templates A/B testing Custom branding 24/7 award-winning support	7 marketing channels 1-click automations Basic templates Marketing CRM Surveys New Websites New Custom domains

MARKETING CRM

Contacts	200,000+ **	100,000**	50,000**	2,000
Audiences	Unlimited	5	3	1
Audience Dashboard	✔	✔	✔	✔
Tags	✔	✔	✔	✔
Segmentation	Advanced	Basic	Basic	Basic

Source: Mailchimp

Conclusion

It's important to highlight that while Mailchimp provides these CRM-like features, it may not offer the depth and complexity of a dedicated CRM platform. For businesses with more extensive CRM needs, particularly in sales and customer relationship management, they may choose to integrate Mailchimp with a specialized CRM system to create a more comprehensive solution.

Since software and service offerings can change over time, I recommend visiting Mailchimp's official website or contacting them directly for the most up-to-date information on their features and offerings, especially if they have expanded their CRM capabilities since my last update in 2021.

Overall, it's a very intuitive platform, and the drag-and-drop email builder is easy to work with. However, Mailchimp can become quite an expensive platform if your needs are more complex.

Option Three

About

ActiveCampaign has a long-standing reputation as one of the more robust CRM platforms for small to midsized businesses (SMBs).

ActiveCampaign is a comprehensive customer relationship management (CRM) platform that provides a wide range of tools for managing customer relationships, marketing automation, email marketing, and sales. It's known for its integrated approach to CRM and marketing automation, making it a popular choice for businesses looking to streamline their customer engagement efforts.

ActiveCampaign also offers a robust API and top-tier third-party extension support that many newer CRM platforms do not currently have.

ActiveCampaign was founded in 2003 with one mission: to provide small and mid-sized businesses with a powerful and flexible solution for their marketing, sales, and customer relationship management needs.

Over the years, it has evolved into a robust platform with a wide range of features and integrations, making it a leading solution for businesses of all sizes. The sheer number of users it has (over 145,000 users to be exact) should tell you enough about the quality of service you can expect!

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Aims to streamline and simplify marketing and sales processes, improve customer relationships, increase sales and revenue, and provide data-driven decision-making.

Dashboard
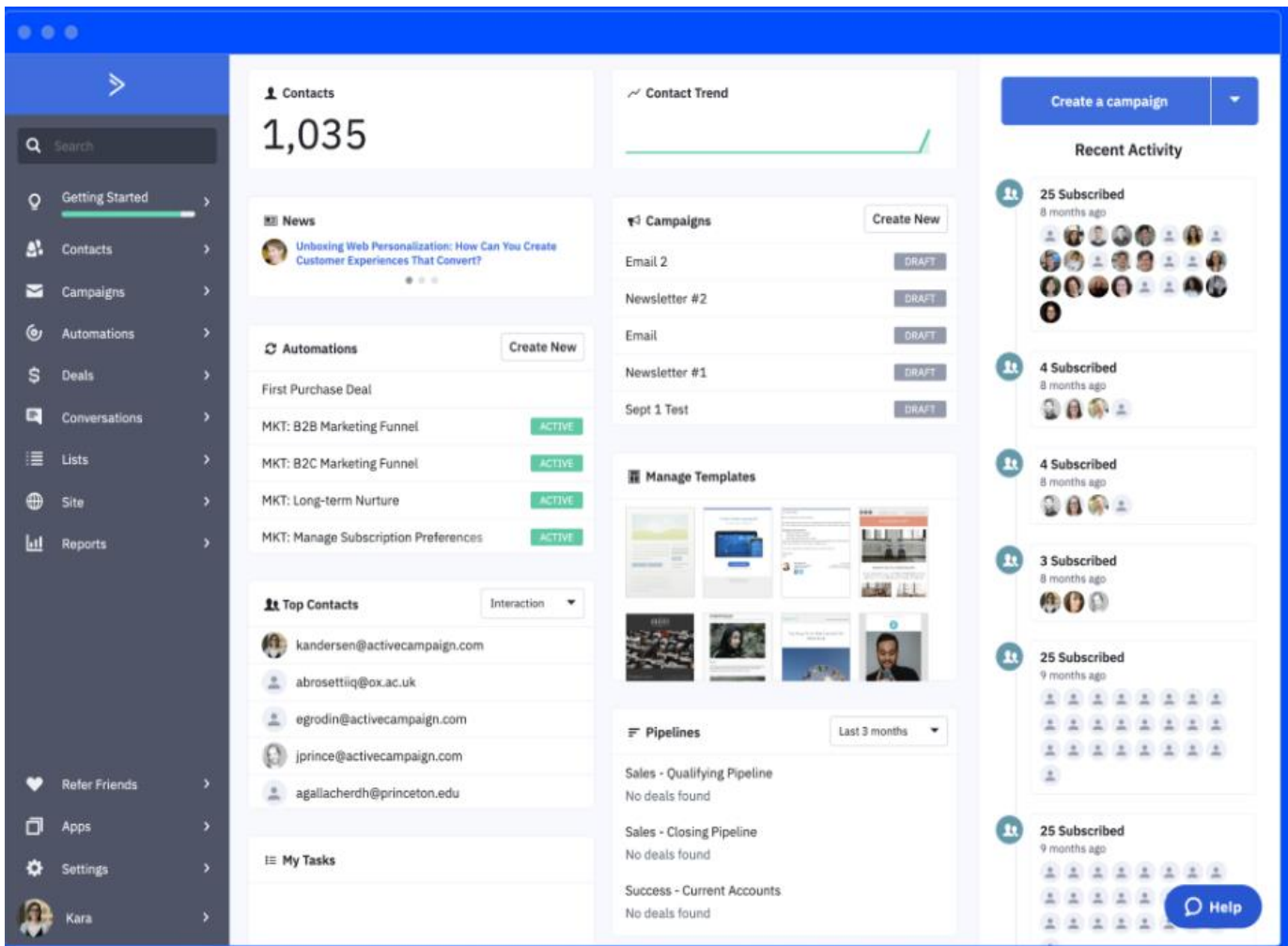
Features

Pitman CRM Implementation

ActiveCampaign's CRM features can help you manage your customer relationships and interactions more effectively. That's because they make it easy to store, organise, and manage all your customer and prospect information (such as contact information, communication history, purchase history, and more) in one place.

1. **Contact Management -** ActiveCampaign offers robust contact management capabilities. You can create detailed contact profiles that include contact information, behavior history, communication preferences, and custom fields.

2. **Automation Workflows -** ActiveCampaign excels in marketing automation. It allows you to create complex automation workflows based on customer behavior, triggers, and events. These workflows can automate marketing and sales processes, such as lead nurturing, segmentation, and personalized messaging.

3. **Email Marketing -** ActiveCampaign includes a powerful email marketing platform that enables you to create and send targeted email campaigns. You can segment your email list based on various criteria and track email performance with detailed analytics.

4. **Lead Scoring -** The platform provides lead scoring capabilities, allowing you to prioritize leads based on their engagement and interactions. This helps sales teams focus their efforts on the most promising leads.

5. **Sales Automation -** CRM features extend to sales automation. It includes tools for managing deals, tracking sales pipelines, and automating sales tasks like follow-ups and lead assignments.

6. **Integration Capabilities -** ActiveCampaign integrates with a wide range of third-party applications and services, including e-commerce platforms, content management systems, and other CRM systems. This flexibility allows you to connect ActiveCampaign to your existing tech stack.

ActiveCampaign Pros and Cons

Pros

- It's a comprehensive platform that offers a plethora of features for email marketing, sales, and customer relationship management.
- ActiveCampaign integrates with a wide range of popular tools and platforms, making it easy to connect with other systems and streamline your workflows.
- It's relatively affordable, with paid plans that are competitively priced and offer a good value for the features included.
- It offers extensive segmentation options.

Cons

- The basic plan is limited to 500 subscribers and 500 email sends per month, which may not be sufficient for larger businesses.

- ActiveCampaign only offers email and chat support, which may not be suitable for those who prefer to speak with a representative on the phone.
- The platform has a steep learning curve, especially compared to other platforms like Mailchimp.

Benefits

1. **Automated, Personalized Customer Messaging:** Buyer preferences and behaviors are tracked and captured. This allows you to get to know your customer and then show them exactly what they are interested in at the best time via automated, personalized customer messaging.

2. **Time-saving Email Templates:** ActiveCampaign has a library of over 125+ customizable email templates. It is easy to send beautiful messages in just a few clicks. Simply choose a design template, add your information and send. All the code, design, and QA are built-in with these responsive email templates, saving time.

3. **Multi-Channel Marketing Capability:** ActiveCampaign allows you to coordinate messaging across multiple channels. This allows you to send personalized emails, SMS messages and Facebook ads to all your database contacts.

4. **Seamless CRM Integration:** ActiveCampaign's inbuilt CRM links up intelligently to all of your email marketing data. With additional features like lead scoring, sales teams can quickly follow up with hot leads.

Pricing

ActiveCampaign Sales pricing starts at $23/month/user for the Plus plan. This gives you all the core CRM tools. So, pipelines, deals and account management. Contact and task management. Sales automation, lead scoring and reporting.

The Professional tier costs $49 a month per user. At this price, you unlock sales engagement and 1-to-1 email automation. Plus, win probability and sentiment analysis, Facebook Lead Ads and the option to A/B split test automations.

Pitman CRM Implementation

All new users do get a 30-day free trial. This gives you access to all features, including email marketing, sales CRM, and automation. For a full price breakdown, read our ActiveCampaign pricing guide.

		MOST POPULAR	
Lite	**Plus**	**Professional**	**Enterprise**
For solopreneurs who need their marketing to run effortlessly	For small teams focused on crafting excellent experiences across the customer lifecycle	For teams that want to experiment and optimize their marketing efforts	For growing teams in larger orgs looking to personalize their marketing at scale
$29	$49	$149	Let's customize the right plan for you
per month, paid yearly (USD)	per month, paid yearly (USD)	per month, paid yearly (USD)	
1 User	3 Users	5 Users	10 Users
Get Started	**Get Started**	**Get Started**	**Talk to Sales**
	Everything in Lite +	Everything in Plus +	Everything in Pro +
✓ Email Marketing & Marketing Automation	✓ Landing Pages	✓ Predictive Sending	✓ Custom Reporting
✓ 24/7 Chat & Email Support	✓ Facebook Custom Audiences & Lead Ads	✓ Split Automations	✓ Custom Objects
✓ Inline Forms	✓ Lead Scoring	✓ Salesforce Integration	✓ Single Sign-On
✓ Site & Event Tracking	✓ Pop-Up & Modal Forms	✓ Microsoft Dynamics 365 Integration	✓ Uptime SLA
✓ API & Webhooks	✓ Conditional Content	✓ Site Messages	✓ HIPAA Support
	✓ WooCommerce, Shopify & BigCommerce Integrations	✓ Attribution Reporting	✓ Custom Mailserver Domain
		✓ Conversions	✓ Unlimited Email Testing
		✓ Accounts	

Conclusion

ActiveCampaign is worth considering. As mentioned, it offers a plethora of marketing and sales features, all in one platform. This can save you time and money compared to using multiple tools to manage your marketing efforts. Besides, although it may seem complicated at first, you can quickly get used to the user-friendly interface and start using it like a pro.

However, if you're a large enterprise with complex marketing and sales processes, you may need a more robust solution that can handle a large volume of contacts and interactions. In that case, you may want to consider enterprise-level marketing automation software, such as HubSpot, Marketo, or Pardot.

Pitman CRM Implementation

In short, whether ActiveCampaign is worth it really depends on what you're looking for and what your specific needs are.

RECOMMENDATION

CRM system brings many benefits for your company and it's one of the main investment companies made at the beginning.

However, as much as the system can be great, it always comes down to the management and how your employees are using the system.

Criteria	Salesforce	ActiveCampaign	MailChimp
Features	Comprehensive CRM features	CRM + marketing automation	Basic CRM features
Pricing	High, various pricing tiers	Competitive pricing plans	Budget-friendly options
Scalability	Scalable for large enterprises	Suitable for SMBs and growth	Limited scalability
Integration	Extensive third-party integrations	Wide integration options	Limited integration options
Customer Support	Multiple support channels	Email and chat support	Email support only

Considering the budget, user requirements, and expected growth in contacts, I would recommend ActiveCampaign for Pitman Training Group. Here's why:

❖ **Cost-Effective:** ActiveCampaign typically offers competitive pricing for businesses of this size, making it a cost-effective choice.

❖ **Comprehensive CRM and Marketing Automation:** ActiveCampaign provides a comprehensive CRM platform with strong marketing automation capabilities, which aligns well with Pitman Training Group's needs.

❖ **Scalability:** It can handle the current contact list of 27,321 and the expected growth to 35,000 contacts. It also allows for scalability as the organization grows.

Pitman CRM Implementation

❖ **User-Friendly:** ActiveCampaign is known for its user-friendly interface, which can be an advantage for a team of 10 users.

❖ **Robust Features:** ActiveCampaign offers a wide range of features for contact management, lead nurturing, automation, and reporting, suitable for both sales and marketing teams.

❖ **Support and Training:** ActiveCampaign provides customer support and training resources to help users get the most out of the platform.

While Salesforce is a powerful CRM, it might be over-budget for a team of 10 users in this scenario. Mailchimp, while a solid email marketing platform, may not provide the depth of CRM features and scalability that ActiveCampaign offers.

It's important for Pitman Training Group to conduct a detailed evaluation of ActiveCampaign's specific pricing plans and features to ensure they align with their exact requirements and budget constraints.
If the employees aren't using the system how is meant to be used, the system will ultimately fail regardless. Therefore, it's important to ensure you have a proper change management plan for your new CRM system, you provide proper training, so your employees don't fall back to the old way of doing business.

Overall, implementing a CRM system can help Pitman Training Group enhance its customer relationships, streamline operations, and drive business growth by leveraging data-driven insights and automation.
CRM systems can be customized to meet the specific needs of Pitman Training, allowing them to tailor the system to their unique business processes.

Having a well-implemented CRM system can give Pitman Training a competitive edge by enabling them to provide superior customer experiences and adapt quickly to market changes.