Groundhogg

THE DEFINITIVE CRM BUYER'S GUIDE

The questions that businesses using WordPress need to ask (and have answered) so you can stop researching and finally Launch, Grow, and Scale!

Written by
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Hi! My name is Adrian Tobey

I help small businesses, agencies, and nonprofits adopt proven digital marketing strategies so they can finally launch their marketing, grow their audience, and scale their businesses!

I do that by helping them find the best CRM and marketing automation products that fit their needs, ending the endless trial and research period.

First time choosing a CRM?

I've seen business owners spend **weeks** trying to decide on CRM. This guide will help you make an informed decision ASAP, and skip the analysis paralysis.

Not your first rodeo?

I don't need to tell you that choosing a CRM is **hard**. You talk to a sales guy, he promises the world, you sign up, do a couple of onboarding calls, and 3 months later you still haven't seen any ROI. *Sound familiar?* This guide will help you avoid a similar fate as you look for your next CRM.

I'm confident this guide will help you make the right decision when choosing a CRM for your business that works with WordPress.

In 10 minutes of your time, we'll cover...

- What's important when choosing a CRM
- What features to look for
- What resources you'll need
- Which red flags to avoid
- And how to get started when you've chosen your new CRM

I hope you enjoy!

Adrian Tobey
Founder, Groundhogg Inc.

FULL DISCLOSURE

I'm obviously going to try and convince you that the CRM you should choose is **Groundhogg**.

That being said, there are other good solutions out there, and this guide will help you equally in determining if they are a good fit for your business.

CRM SHOULDN'T MAKE YOU FEEL LIKE...

Ripping your hair out

Because nothing works the way you expect it to.

Screaming expletives

Because your bill keeps getting more expensive and has ZERO return on investment.

Smashing your computer

Because support blames you for their problems instead of solving them.

Dread logging in

Because everything is slow and accomplishing simple tasks is almost impossible.

On the contrary...

IT SHOULD MAKE YOU FEEL

Relaxed

Knowing that your emails and funnels will go out on time without interruption.

Street Smart

Knowing you got a great deal on a CRM that earns you more than you pay for it.

Secure

Knowing your data is safe and sound, and will be available to you at any time.

Joyful

Knowing that when you need to do a task in your CRM it'll be quick and painless.

Start a 14-day demo → groundhogg.io

Choosing a CRM shouldn't feel like a risk. You should feel confident that you're making a good choice for your business.

These are the red flags 🚩 to watch for before making a decision.

SMALL BIZ CRM RED FLAGS!

🚩 **Required Initial Setup Fee**
If your CRM makes you pay an initial setup fee just so you can start using it, red flag.

🚩 **Needed Third-Party Integrations**
If you need to invest in more third-party software to connect your CRM to your existing tools and WordPress, red flag.

🚩 **No/Confusing pricing page**
If you need to talk to a sales rep to understand what you're going to pay, that's a huge red flag.

🚩 **No self-serve demo?**
If the CRM doesn't let you log in and test independently without supervision, they're not confident in their product. Red flag!

🚩 **Long implementation time**
It shouldn't take months to implement a CRM into a functioning business. If you're being told it's going to be more than a few weeks, red flag.

THE 6 QUESTIONS

You need to ask before committing to a CRM

1. Is the CRM **actually** a CRM?
2. Does the CRM include Marketing Automation?
3. Does the CRM have **native** integration with your existing software (WordPress & plugins)?
4. Is it easy to transfer data **in and out** of the CRM?
5. Will the CRM support your business goals long-term?
6. Does the CRM offer meaningful support and resources?

IS IT ACTUALLY A CRM?

There are 100s of “CRM” products to choose from, but not all are made equal. *Many are quite terrible as CRMs, you might know from experience*.

Some products claiming to be CRMs (or have CRM capabilities) are better described as glorified list management tools or email marketing platforms. Think MailChimp, MailPoet, etc...

Businesses **need** a CRM, but choosing a product that doesn’t function as a proper CRM can hurt your business long-term as you struggle to grow with it.

So, what are the **necessary** features of a good CRM? I would personally look and confirm the existence of the following.

- ✓ Contact management
- ✓ Staff assignment & roles
- ✓ Segmentation
- ✓ Custom fields
- ✓ Activity & History
- ✓ Notes & tasks
- ✓ Comprehensive analytics

DOES THE CRM INCLUDE MARKETING AUTOMATION?

So you found a CRM that checks all the CRM boxes, great! However, a CRM on its own is only so useful. But when you pair it with Marketing Automation, that's when the magic happens!

We're going to bundle Email Marketing with marketing automation since they are interchangeable terms.

Like CRM, not all marketing automation platforms are made equal, and picking one that doesn't meet your needs will hinder your growth.

What are the necessary features for a solid marketing automation platform?

- Easy to use
- Templates
- Analytics
- Triggers & actions
- Integration
- CRM Connection
- Transferability

DOES IT HAVE A NATIVE INTEGRATION WITH WORDPRESS?

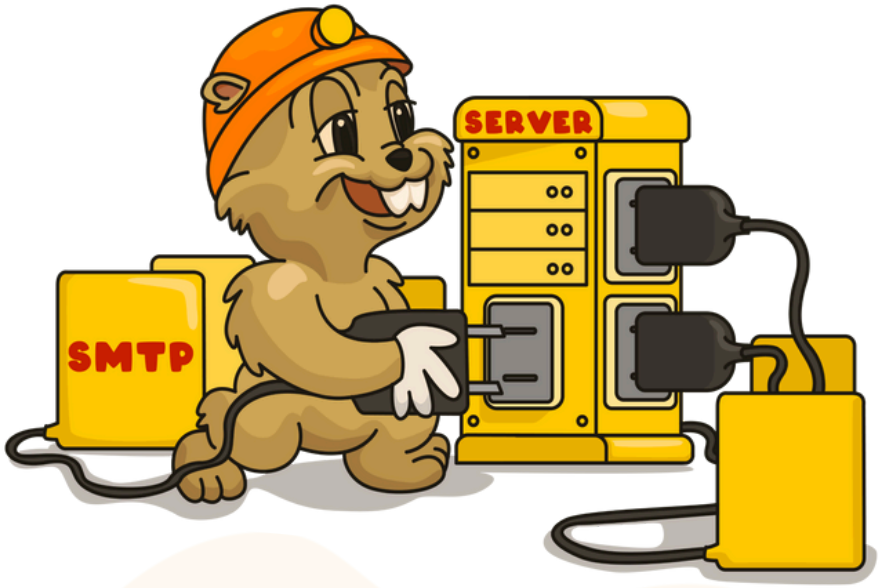
If you're using WordPress as your CMS, choosing a CRM that offers a native integration is paramount!

Your WordPress site is your business's door to the world. If that door doesn't feed into your CRM then you're missing out on potential business.

Very few SaaS CRMs offer native integrations with WordPress.

Native meaning that the developers of the CRM also develop the integration with WordPress.

Sometimes plugin providers will offer specific integrations for their plugins with popular SaaS CRMs, however, those integrations are often limited in scope and generally only facilitate creating contacts and applying tags.



If you want a complete integration for a SaaS CRM with WordPress and your plugins you'll have to invest in a 3rd party integration tool like WPFusion, Zapier, or WP/Uncanny Automator. This adds cost and complexity, not good.

Choosing a WordPress-based CRM avoids all that because since it's hosted in WordPress, it has a native integration with WordPress and can natively integrate with your plugins.

IS IT EASY TO TRANSFER DATA IN AND OUT OF THE CRM?

9/10 times importing data into a CRM, SaaS or otherwise is fairly straightforward.

But what about pulling data out?

SaaS CRMs have a vested interest in making it difficult for you to access and export your content from within their systems. Making it difficult to leave is why unhappy customers continue to pay their subscriptions.

There are many good reasons to want to export your data.

- ✓ Migrate to a new system
- ✓ Run a custom report in Excel
- ✓ Copy content to another application
- ✓ Make a backup

The truth is that when you use SaaS CRMs, you don't own your data and content. You're renting it.

The scary part is that when you sign up for these SaaS CRMs they have a clause in their terms and conditions that they can kick you off at any time for any reason.

It's been known to happen...

WILL THE CRM SUPPORT YOUR BUSINESS GOALS LONG-TERM?

One of the most painful things your business can experience is growing out of a CRM. When you signed up it worked great, but you've grown, they haven't. And now it no longer supports your needs.

It could be that their features don't meet your new needs, or that their performance doesn't match your pace.

I've seen that many times when businesses start with a "Simple" CRM and quickly grow out of it.

The opposite has also been known to happen, where CRMs outgrow their user base in terms of complexity and price, forcing businesses to migrate to other solutions.

The best decision you can make is to buy a CRM that will match your pace of growth.

DOES THE CRM OFFER MEANINGFUL SUPPORT AND RESOURCES?

Going into CRM cold can feel like trying to assemble Ikea furniture without instructions. Without guidance, resources, and a plan, it can be incredibly difficult to get an ROI.

Technical documentation is helpful and tells you how things work, but it doesn't tell you **what to do**. That's why strategic guidance tailored for your business is equally important.

When picking your CRM, confirm they offer resources like...

- ✓ Training courses (Academy)
- ✓ YouTube channel
- ✓ Onboarding calls
- ✓ Office hours
- ✓ Technical support
- ✓ Extensive documentation

That way you can be sure you won't be left high and dry to figure it out all by yourself.

Choosing a CRM is like buying a car. What doesn't work, and what you don't like only becomes apparent **after** the test drive.

Some cars are sporty and flashy but lack basic comfort features like heated seats.

Some cars are cheap and cheerful, but they don't have modern features like reverse parking cameras, and they're expensive to maintain. Some cars are expensive to buy, and even more expensive to maintain.

If I were to buy **one car** for the rest of my life, I'd want something reliable, cheap on maintenance, looks decent, good on gas, can fit a decent amount of storage, and fit kids in the back seat.

As a business owner, when choosing a CRM I want something reliable, inexpensive to maintain long-term, scalable, offer team access, and integrate with the rest of my business.

What you don't want to be doing is buying a new car every few months. You want to buy one car you like and stick with it.

Switching CRMs is painful (and expensive). I want you to make the most informed decision you can for buying your **one CRM** that meets the demands of your business.

SO WHICH CRM SHOULD YOU CHOOSE?

I encourage you to do your own *extensive* research using these questions so that you can make an informed decision.

But, if you want a recommendation for a product that checks all the boxes, you need Groundhogg. Why?

Groundhogg's CRM is robust and extensive

Groundhogg's Marketing Automation features are **comprehensive**, rivalling bigger and pricier products

Groundhogg natively integrates with WordPress and your plugins.

Groundhogg's feature set can support small, simple businesses and large corporate behemoths alike

With Groundhogg, there are no limits on contacts or users.

With Groundhogg, you own all your data.

Groundogg will match your growth and scale with you.

Groundhogg has extensive documentation as well as many strategic resources.

OBJECTIONS

Is it a good idea to self-host my CRM?
Yes! You lower expenses, own your data, minimize points of failure, and close compliance gaps.

If I self-host using Groundhogg, what are my other expenses?
Groundhogg is an annual flat-rate fee. You will also need to pay for hosting (which you'll have for your existing WordPress site) and an SMTP service.

Do I need to use WordPress to use Groundhogg?
Yes. Groundhogg is installed on WordPress as a plugin, so you must have a WordPress site. It does not have to be your main site, many people using Groundhogg install it on a sub-domain.

Is it really unlimited contacts?
Yes, everything else is unlimited too. Groundhogg charges one flat-fee annually for your license, support, and updates.

Is Groundhogg really better than the expensive SaaS CRMs?
Yes, we think so. There are some tradeoffs with self-hosting, but the price, and direct WordPress integration more than make up for it.