

THE ESSENTIAL GUIDE TO



(Customizing and Integrating)

BASE CRM

BY:



ABOUT

This guide is meant to help businesses who are considering or already using Base CRM.

Whether you're a small business implementing a CRM for the first time, or a larger business switching to Base CRM, this guide should benefit you.

The Guide is brought to you by Bedrock Data, Inc.

EASILY INTEGRATE YOUR BUSINESS DATA

You can use Bedrock to sync between your cloud business systems and keep a running backup of your critical business data.

GET A DEMO!

IN THIS GUIDE

Here is a rundown of the topics that we'll be covering in the guide:



Ease of Use and System Design: How easy is the system to use for your company's users? What are the best features of this system, how do they work and what can they do for your team? This section includes a review of the data model.



Customization: Mainly we will look at customization that you can do with fields and objects in Base CRM. Everyone uses the almighty lead object, but how else can you represent your business with the system?



Integration and APIs: How do you integrate the system with other systems that you're already using? Does the system have an API and how easy is it to use?



Automation: Automation refers specifically to rules you can setup to automate business process. Does the system include lead assignment and workflow rules? How easy are they to use and understand? We'll review these capabilities in each system and focus on ease of use of these features.



Pricing and Scalability: We'll review the pricing and editions that Base CRM offers, including the flexibility you get and the pros and cons of certain editions the system offers.



Mobile: Review of available mobile applications that exist for the system, developed by the company themselves or by a third party. Focused on iOS and Android apps only.



Overall Bottom line: how good of a system is this for your business and should you go through with the purchase of this CRM system?

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WANT TO SKIP AHEAD?

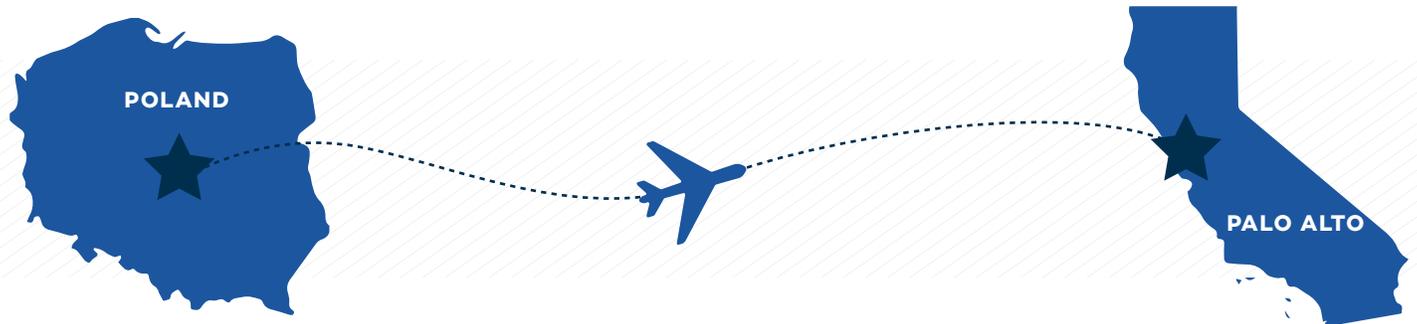
No problem! Here are the systems that we're going to cover:

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WHAT IS BASE CRM?

Base CRM was founded to provide an incredibly usable, modern CRM to companies of all sizes. This versatility is perhaps Base's most impressive feature: you can scale with the product without needing to migrate to something larger and more expensive like Salesforce or NetSuite.

The company as a whole is still relatively small: I'd consider Base a startup company, though they have raised over \$22 million (at the time of this writing). Their teams are split between Poland (which appears to be where the company was founded) and Palo Alto, which is where most of the employees are now.



Base has shown [strong momentum](#) in the CRM market, especially this year (2014), passing the 5,000 customer mark (no small feat) and increased their revenue run rate by **98%**. It certainly appears that Base CRM is on the fast track to an IPO. This should alleviate any concern around adoption of the system:

THE COMPANY HAS STAYING POWER AND TRACTION IN A CUTTHROAT INDUSTRY.

Ok, enough buzz. What really sets Base CRM apart? Why do companies choose Base over more established leaders in the space?



A big reason we found, was mobile. Base really focused on their mobile apps from the beginning of their development and it shows. The apps are **thoughtfully designed, easy to use** and **powerful**.

EASE OF USE



We found the Base web UI to be very easy to use for the most part. There are some really excellent features in the product, like direct dial and the way that the app lets you line up dials to optimize your rep's productivity. You can also make calls directly from the mobile app without using your phone app through the iPhone and Android apps.

Base follows a similar data model to other popular CRMs, which is a plus in our minds. Essentially if you've used one, you've used them all: leads are created in Base from your website or [marketing system](#), then qualified by your sales reps and then converted into contacts.

Base treats leads a little differently than other CRMs, where leads are really high-level, unqualified records. Base doesn't have the idea of automated "lead assignment" either – though they do have automated assignment of contacts when leads are converted into contacts. This is done through the Automated Actions tool which we'll discuss next.

Base also comes with a bunch of useful, automated reports that will help managers report on your team's performance. These include sales stage distribution on deals, call logs for your reps, sales forecast reports and [many more](#).

Overall, Base is a pleasure to use, but you can tell that there are a few features that still need to be added to the platform as they grow.

BASE'S DATA MODEL

Records start as leads in Base CRM. Leads are people and start out unqualified. They are typically generated by your marketing team.



Leads are worked and qualified. If qualified, then the lead will be **converted** into a Contact and associated with a contact of type company.

When you convert a lead with a "company name" that company will get created as a contact as well.

Deals, which represent pieces of business are associated with both types of contacts. Deals that are "won" will also mark companies and contacts as customers and will affect your Base CRM reporting as well.



ACTIVITIES



NOTES



TASKS

Other "child" entities such as Accounts, Notes and Tasks can be added to parent objects and tracked over the lifetime of a record in the system.

CUSTOMIZATION

For being a CRM for smaller businesses, Base CRM is actually fairly flexible and seems to be getting better in terms of its customizations. You can't create custom objects in base, but you can customize fields to represent your data and there are some object types in the system like products, reports and a "communication center" that puts Base in front of other "SMB CRMs."

Access Base CRM's customization features here under "*Settings -> Customize.*"

PROS:

Custom Fields:

Are supported essentially across all object. You can create custom fields on leads, contacts, companies, deals, etc... All major field types are also supported and there doesn't appear to be a limit to the number of custom fields that you can create.

Products:

Products acts a lot like a custom object that you would probably want to create in your CRM to represent the goods and services that your company sells. Products in Base work well with Deals and Reports, allowing you to add discounts and markups to your deal amounts, which will then reflect in your sales pipeline reports.

CONS:

Some downsides to Base's customization features are the lack of custom object support, and the inability to manipulate the layouts of your lead view. You can't customize what data your users are shown when they are using the system.

Reports:

Many of the reports in Base are extremely useful, we actually consider this a pro in many respects. We did wish that there was a way to create custom reports from scratch though, as exists in many other CRMs.

AUTOMATION

Workflows (Automated Actions): Automated actions in Base are essentially CRM workflows, as they're called in other systems. Workflows, if you're not familiar, allow you to do automated tasks that are triggered by certain actions. In Base, these actions include the following:



So if one of these triggers happens, then the actions that you define will fire. Those actions are rather limited at the moment, and include:



Tasks let you specify an owner and name of the task, as well as when the task is due. You can then choose to have the owner of the task altered before it is due.

A NOTE ABOUT LEAD AND CONTACT ASSIGNMENT:

Base is a little different than other systems in terms of their lead assignment. Records really aren't assigned in Base until they are converted into Contacts, and this is on purpose. Leads in Base are more "top of the funnel" than they are considered in other systems, which is perhaps why they can't be assigned directly in that state.

[Base's APIs](#) are RESTful, which is very nice and easy to work with. Most of the data that Base's API provides is either in JSON or XML format.

For the most part, our developers found the Base API easy to work with, though not all of the Base CRM product is available via the API, though the main objects are accessible: leads, contacts, accounts (company contacts) and deals.

You can also add "tags" and manipulate "sources," which lets you state where your deals are originating (website, word of mouth, referral, etc...), which will reflect in your reporting. Reminders and notes are also supported via the API on contacts and deals (not on accounts and leads).

As of the time of this writing, the Base API doesn't let you work with products, calendar, activities, tasks or reports though, and it's unclear whether the API will support those objects in the future.

Overall, a solid API to build against, and here's hoping that Base expands upon this functionality in the future.



NATIVE INTEGRATIONS

The folks at Base were nice enough to provide its users some native integrations free and out of the box (something that's pretty rare in the CRM space today). Here's a rundown of integrations available to you for Base CRM:



MailChimp: Base's [MailChimp integration](#) is very simple. It works by letting you select specific contact records (leads aren't supported) and then add them to a specific list in MailChimp. This alleviates the need to manually export and import, but doesn't automatically sync data as it changes.



Google Drive and Dropbox: Allows your users to sync files to folders that are based on deals in Google Drive or Dropbox. These two integrations are fairly manual, and essentially have the same features.



Harvest: This integration lets you create a project in Harvest for a deal once a deal has been set to the "won" stage. You can specify the client and project name in Base and that will sync across. Again, this integration is rather manual, rather than an automated sync that happens automatically when a deal is set to "won."



Xero: The Xero integration will create draft invoices in Xero from Base for a particular closed deal. It's a lot like the Harvest integration, and will serve as a good manual integration.

LEARN MORE ABOUT BASE'S NATIVE [INTEGRATIONS HERE](#).

3RD PARTY INTEGRATIONS

The native integrations that Base offers out of the box are great for doing manual, one-off tasks where you want to push or pull some Base data to or from another system that you're using. Many folks are looking for a little bit more automation though, which 3rd party integration platforms can provide. Here are a couple of integration platforms for you to consider using with your Base CRM:



Bedrock Data: Bedrock's integrations are a little more robust, in that they allow you to create and update all major record types (lead, contact, company and deal) to and from Base. Bedrock also lets you map data across related objects (contacts -> deals for instance), and allows you to do cross system workflows, which can limit the records that get synced to and from Base. Bedrock is great for businesses looking for a more robust automated integration (but we're not biased or anything). 😊



Zapier: Base advertises Zapier integrations, which are great for a simple, one-way automated integration that will create new records in Base when they are created in other systems. You can use Zapier to create leads in Base, and fetch other data from records like deals and companies to sync to other systems that you're using. If you're a small business and don't need to update your data as it changes, then Zapier is a great integration option.

PRICING AND SCALABILITY

Base CRM has [pricing](#) that is straight-forward and easy to understand:

	MOST POPULAR	
STARTER	PROFESSIONAL	ENTERPRISE
\$15	\$45	\$125
per seat / month	per seat / month	per seat / month
Risk Free Trial Period - 14 Days	Risk Free Trial Period - 14 Days	Risk Free Trial Period - 14 Days
Leads, Contacts, Deals & Tasks - Unlimited	Leads, Contacts, Deals & Tasks - Unlimited	Leads, Contacts, Deals & Tasks - Unlimited
Document Storage - 2GB/User	Document Storage - 5GB/User	Document Storage - 10GB/User
Premium Integrations	Premium Integrations	Premium Integrations
Email Automation	Email Automation	Email Automation
Native Mobile Apps (iOS, Android, WP)	Native Mobile Apps (iOS, Android, WP)	Native Mobile Apps (iOS, Android, WP)
Geolocation	Geolocation	Geolocation
Click to Dial (Base Voice)	Click to Dial (Base Voice)	Click to Dial (Base Voice)
Call Recording	Call Recording	Call Recording
	Document Repository	Document Repository
	Task AutomationSales Forecasting	Task AutomationSales Forecasting
	Advanced Sales Insights	Advanced Sales Insights
		Call Analytics and Reporting
		Phone Auto Dialer
		Call Scripts
		Teams and User-Based Permissions
		Lead and Deal Scoring

All versions of Base include API access (with no limits, which is nice!), native integrations, click to dial and the (sweet) mobile apps.

[Check out Base's pricing page](#) for a full rundown of features available at the different levels of the product.

MOBILE APP

Ok, on to the good stuff! Mobile is where Base CRM really shines. After all, they call themselves “the first post-PC CRM.”

Base’s apps let you manage your contacts, track sales, log calls or create tasks all from your Android, iPhone or tablet. All changes are instantly synced with the Base CRM web app, almost instantaneously.

Some features include:



It’s just really simple and nice to use. Easy to find things that you’re looking for and very intuitive. It was one of the few CRM apps that’s actually fun to use.



Geolocation to map your customers and sales opportunities on a nice, integrate Google Map.



Make calls right from the app.



Automatically log calls, then create a note or task to document the call.



Create leads or contacts and manage (edit) them through your sales pipeline.

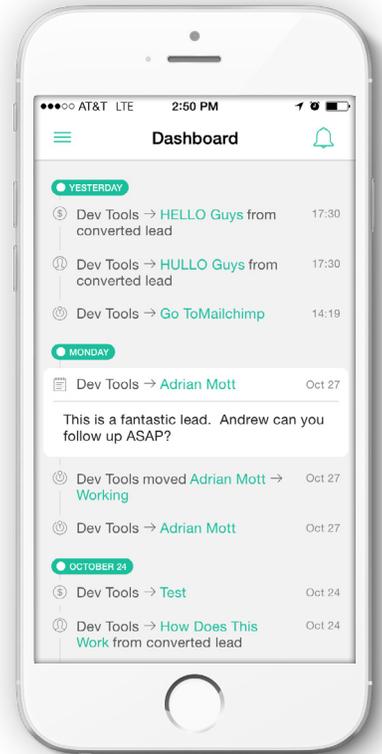
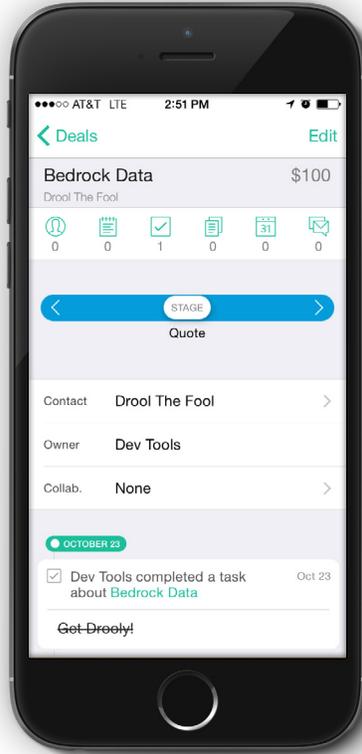
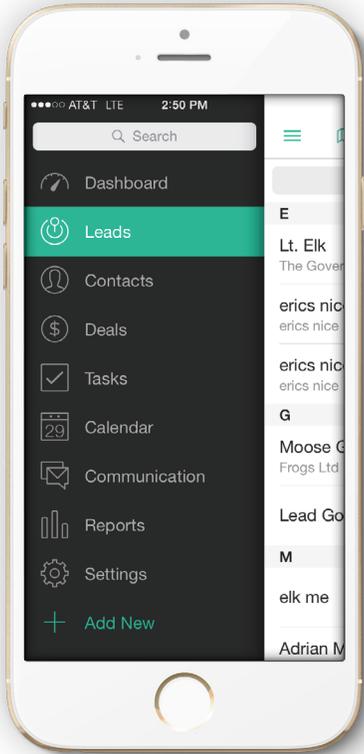


Add and view tasks and reminders so you always remember to follow up with leads and contacts.



Nice “timeline” which shows you a lead or contact’s activity over their lifetime.

MOBILE APP



APP STORE RATINGS:



I-PHONE: 4 OUT OF 5



ANDROID: 4.3 OUT OF 5

OVERALL TAKEAWAYS

Because we work with so many CRMs out there on the market today, we tend to see 2 separate groupings of the business software: each targeting a different company size. Base CRM at first glance appeared to be targeted at small sales teams, just due to the lack of automation and customization features.

For what Base lacks in these features though, it makes up for in really great out-of-the-box reports and a mobile app presence that is second to none. These features make Base a more modern approach to traditional sales software, where sales reps are becoming more mobile and working from home, in the cloud is the norm. Larger companies are starting to take notice of these trends and that's making Base a real player in the space.

As I've mentioned throughout this guide, Base's best feature is its simplicity of use and mobile apps. Overall, our experience with Base, as well as working with Base's API and Base's clients has been overwhelmingly positive.

If Base can work for your sales team as you scale, then it comes highly recommended from us.

Thanks for reading!

EASY-TO-USE BUSINESS DATA MANAGEMENT AND INTEGRATION SOFTWARE

(IT'S LIKE DROPBOX FOR YOUR BUSINESS DATA)

GET A DEMO!