

Simple CRM System

Executive Summary

Pitch

Simple CRM System is a super-simple CRM system for small businesses, that allows you to gain the benefits of modern, advanced CRM systems, but keep working in the same way you like - using a spreadsheet. In our spreadsheet you can set reminders, attach files, set appointments, sync with your Google calendar, send e-mails and more! All from inside the spreadsheet you love.

The problem

Many small businesses have been looking for a suitable CRM for YEARS. Although the market is flooded with expensive, cheap, free and open-source solutions, there's no viable solution that is simple enough and easy to use. And we stress that we've heard that opinion numerous times from numerous businesses. Therefore, most small and even many mid-size businesses still use Excel to manage their customers. But Excel is not a CRM! It lacks many basic CRM features.

The Solution

We've set out to solve this problem by providing business owners with a simple solution, similar to the one they are currently using - the spreadsheet, but with all the benefits of a robust enterprise CRM system: setting appointments, reminders, calendar synchronization, advanced search, lead history, all from inside the spreadsheet.

How it works

When starting to work with Simple CRM System, it looks like a simple spreadsheet. You can add customers into new rows, just as with Excel. You can customize the columns by simply typing a new name for a column, and typing data into cells just like in Excel.

After working like that for a while, as you're already used to, you may need more from a real CRM:

- A way to set reminders and appointments
- Synchronizing everything with your Calendar
- A way to collaborate with your team on this spreadsheet
- A (large) place to write the history of your correspondence with your customers.
- A better method to search/filter the spreadsheet, especially if you have 1000+ customers
- Better mobile support

We completely transform the concept of a CRM from a complicated system with many buttons and fields to a simple spreadsheet. There are myriad CRM vendors, but they all provide the same complicated experience. We challenge the conventional model of a CRM by making a simple spreadsheet, like Excel, that provides all the CRM features that you need inside it.

Status

Simple CRM System has launched only recently, and has already secured dozens of paying customers who swear by this software.

The reader is welcome to try the software at <http://simplecrmsystem.com>

For further enquiries:

Shauli Daon, PhD

CEO & Founder

shauli@simplecrmsystem.com

Check the product at: <http://simpleCRMsystem.com>

Some screenshots:

The main spreadsheet - note the PLUS button which allows expanding customer details.

The screenshot displays the Simple CRM System interface. At the top, the logo "Simple CRM System" is visible, along with a "Premium" badge and a menu icon. Below the header, a message reads: "Hi! This is your customers spreadsheet. Click PLUS [+] to expand customer activity." The main area contains a spreadsheet with columns A through F. The data is as follows:

	A	B	C	D	E	F
	Name	Phone Number	Status	E-mail	Assigned to	Loca
1	Max Bookman	(326) 572-2461	In Progress	max.bookman@bookall.net	michael.restman	
2	Michael Doe	(344) 242-2323	In Progress	michael.doe@hotmail.com	michael.restman	
3	Aron Williams	(326) 572-2461	Sold	aron.williams@mail.net	hillary.bookman	
4	Alton Smith	(344) 242-2323	New	alton.smith@mymail.net	michael.restman	
5	Ronald Rowe	(326) 572-2461	New	ron.barr@barr.com	don.rondal	
6	Don Rice	(345) 456-9308	In Progress	don.rice@email.com	michael.restman	
7	Rick Barr	(344) 345-2492	New	rick.barr@email.com	michael.restman	
8	John Lewis	(343) 455-2349	New	john.lewis@aaamail.com	michael.restman	

Below the spreadsheet, there are several action buttons: "Add Reminder", "Set Appointment", "Send E-mail", "Attach File", and "Recent Changes". A detailed view of a customer record is shown below these buttons, with columns A through E. The data is as follows:

A	B	C	D	E
Comments	Date			
1 Sent suggested d				
2				

At the bottom of the interface, there are two buttons: "Set an appointment" and "Leave a Message".

Reminders List

A chronological list of the reminders set (allows to expand a certain reminder and view the spreadsheet row):

The screenshot displays a web interface titled "Reminders List". At the top right, there are two red buttons: a back arrow and a hamburger menu icon. Below the title, there is explanatory text: "This is a chronological list of all the reminders you've set on your customers." followed by two links: "Setting a reminder" and "Using this list".

The first reminder is for "Don Rice" with the task "Ask about the deal". It has a due date of "2017-02-26". Below the reminder details are two buttons: "Open" (with a grid icon) and "Dismiss" (with an 'x' icon).

The second reminder is for "Ronald Rowe" with the task "get back to him". It has a due date of "2017-02-27". It also has "Open" and "Dismiss" buttons.

At the bottom right of the interface, there is a "Leave a Message" button with an envelope icon.