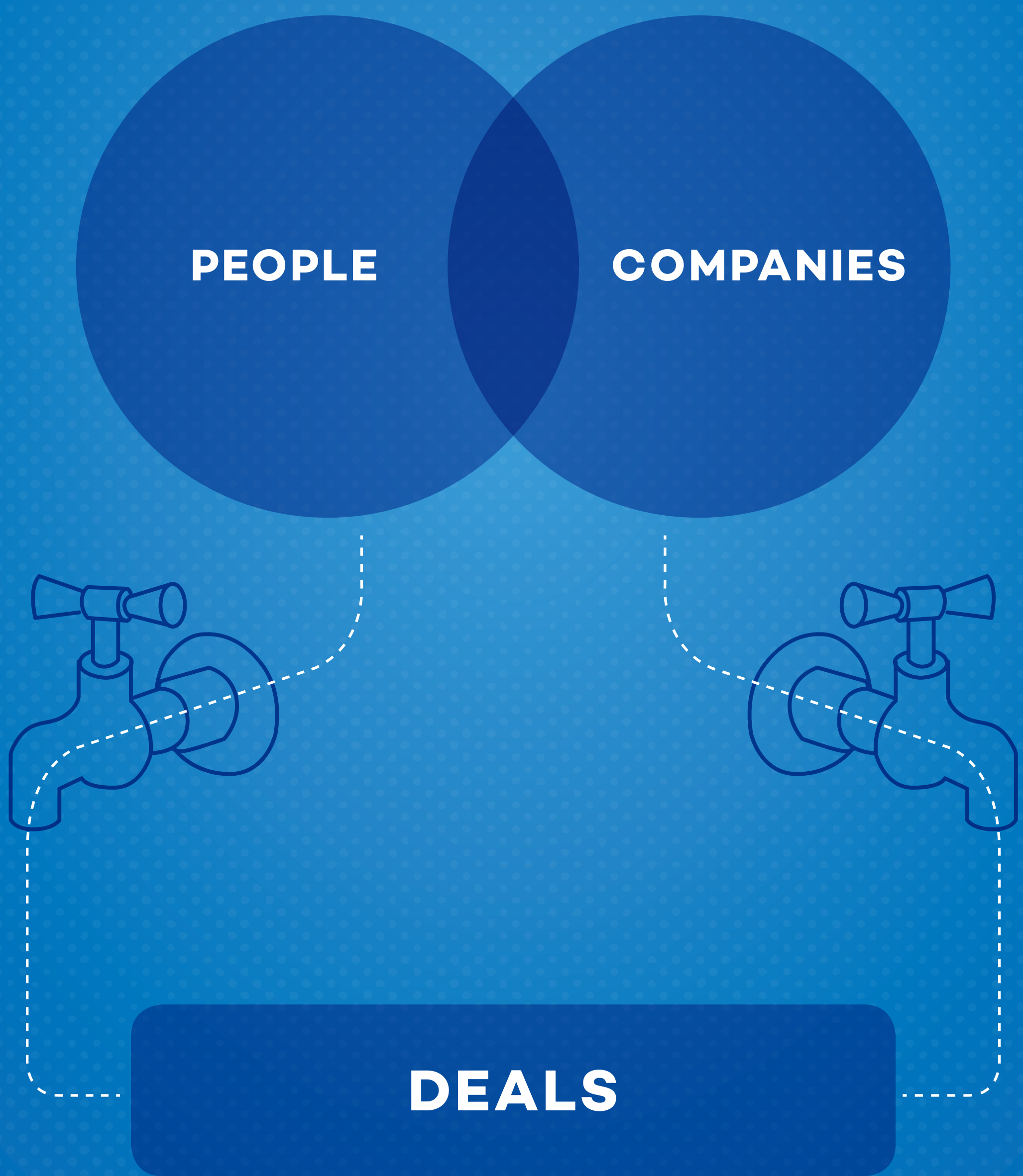
CUSTOMIZING AND INTEGRATING PipelineDeals

by:

BedrockData



ABOUT

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

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

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

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 Pipeline Deals 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 Pipeline Deals. Everyone uses the almighty contact object, but how else can you represent your business with the system?

Setup, Integrations 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?

Integrating Pipeline Deals with Your Marketing System: Some awesome things you can accomplish with a Pipeline Deals Integration with your email marketing or marketing automation platform.

Integration Types and Features – Finance: Some awesome things you can accomplish with a Pipeline Deals Integration with your finance system.

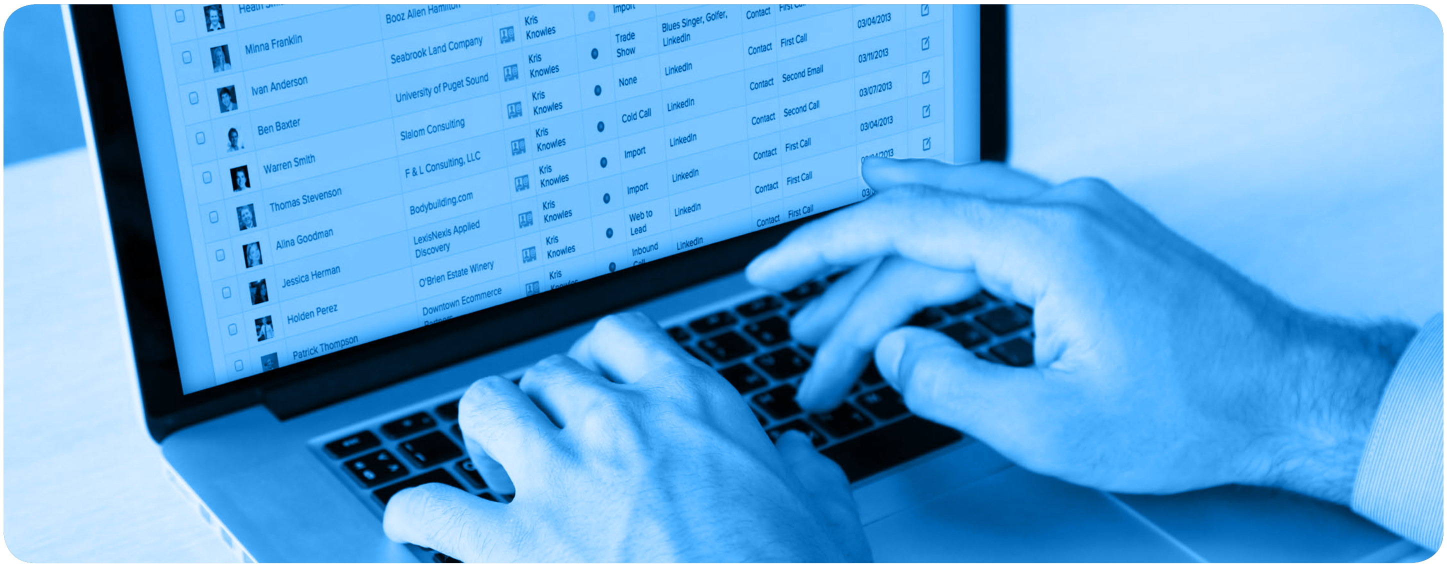
Pricing and Scalability: A quick review of PD's pricing and how scalable the system is in terms of growing with your sales team.

Mobile App Review: 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?

INTRODUCTION

There's a certain sort of respect that companies who bootstrap successfully earn for themselves. Trust us: bootstrapping a startup company successfully isn't easy; but Pipeline Deals has done so in a crowded and cutthroat CRM market since 2006.



Based in Philadelphia, Pipeline Deals was founded to make sales software that's easy to setup and use. In recent years, through constant upgrading of their software: Pipeline Deals has gotten better and better and has become a really nice user experience.

In the CRM space, it's becoming clear that there are really 2 distinct tiers of systems. On the high end, you have large systems that are very customizable – better fits for medium and large businesses. These include Salesforce, Dynamics CRM and Oracle (even Zoho and Sugar fit here as well).

For the smaller businesses, there are many products that are fantastic and more affordable for a small but growing sales team. Pipeline Deals fits in this group, which is quite crowded and also includes Base CRM, Pipedrive and Close.io.

We used Pipeline Deals in house at Bedrock for a few months (as we have lots and lots of CRMs) and found it to be a great product. Simple to setup and even easier to use and integrate.

EASE OF USE

Pipeline Deals ("PD") has a straight forward user interface, and while it's not overly "pretty," it's very easy to use and understand. In fact, the best part of the PD product is in its simplicity – nothing is hidden or hard to find in the system.

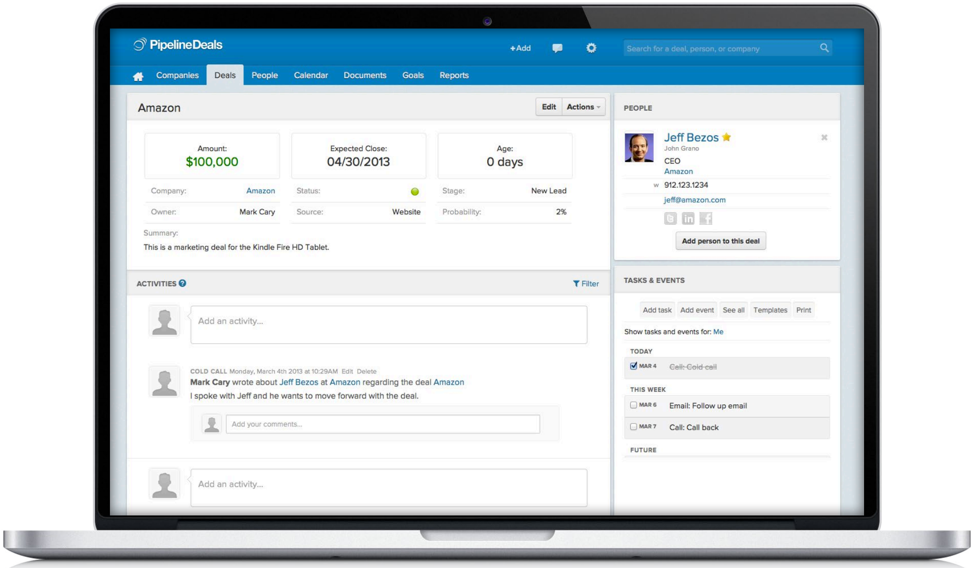
All of the system is laid out right in front of you in the main navigation, as you'll see on the next page in the data model – you have the basic CRM objects: People, Deals and Companies. These objects are related: you can have a deal be associated with a person or a company, and obviously people can be associated with companies as well.

It's easy to create new records and change fields, through the web application or mobile app. Pipeline Deals acts like a system that has a solid API on the backend, which also allows for [easy integrations].

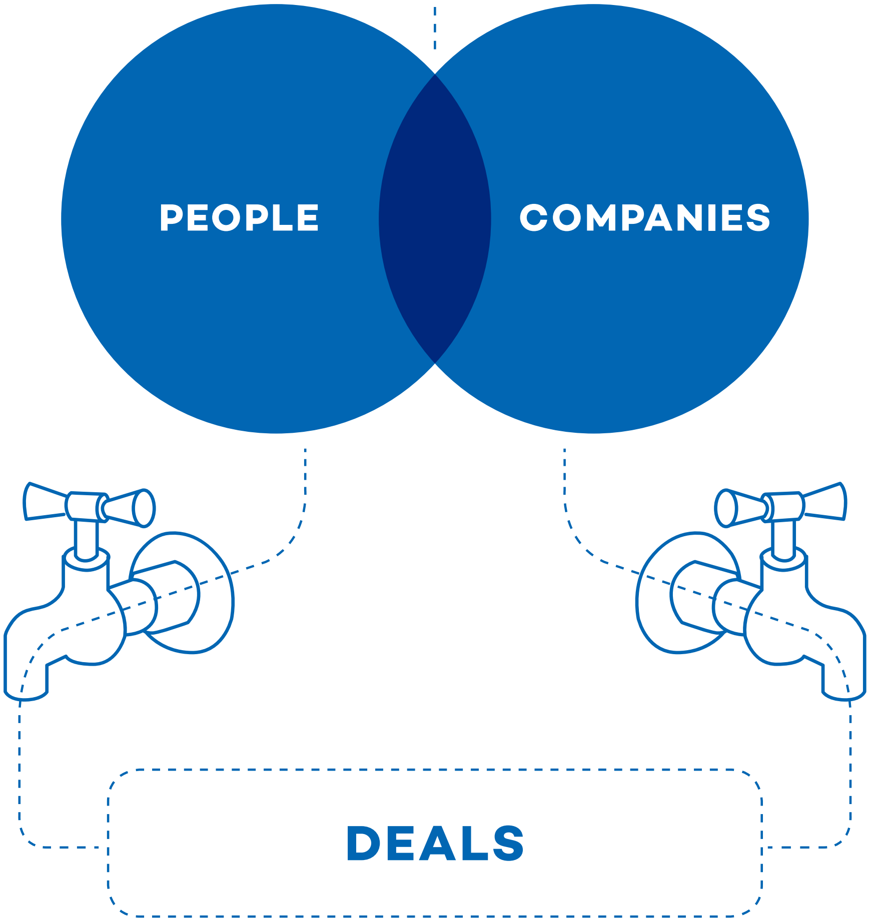
There are other very useful parts of PD, such as the Agenda, which automatically populates with Tasks, such as Expected Close Dates from deals that should be closing in the near future. You can also add Tasks manually for yourself or your team that will automatically populate the Agenda.

The PD Calendar can be used also, which enables you to create agenda items which will populate the calendar. Reports are another useful feature, where canned reports can give you insight into your team's activities and pipeline.

Overall, PD 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.



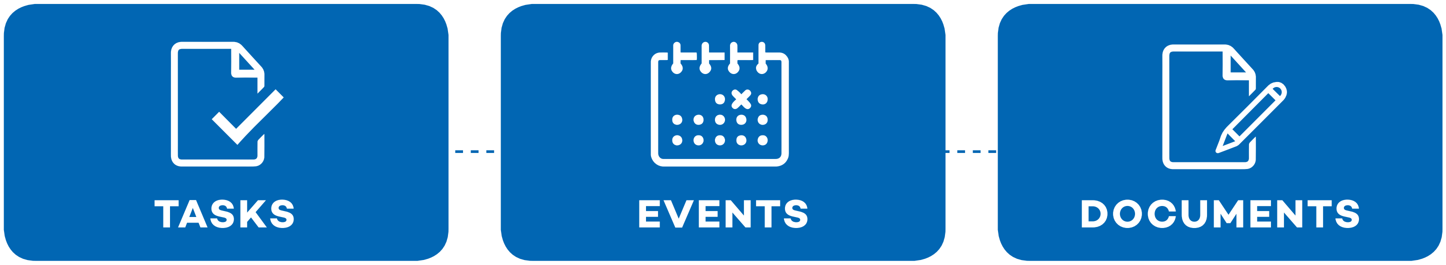
PIPELINE DEALS' DATA MODEL



Pipeline Deals doesn't really have any idea of "people" object hierarchy, where a lead record "converts" into a contact. There are just people, which can be part of a company and also have a deal associated with them.

Companies can have People associated with them, and also have Deals attached to them as well.

Deals can have different stages, eventually ending in a "won" or "lost" state, just like other popular CRM platforms.



Tasks are assigned to users on your team, and will populate their "Agenda" tab in PL system.

Events populate the calendar and Documents can be uploaded and attached to deals and other objects. We sometimes used the Documents feature to attach Consulting statement's of work to deals we were working on.

CUSTOMIZATION

Pipeline Deals lets you tune your Account Settings – these settings include the basics like adding users (some basic roles are supported also), customize the look and feel of the system and edit task and event types. Here are some more thoughts around some of the customization that is and isn't possible in the system:

PROS:

Custom Fields: Are supported essentially across all main objects in PD (people, deals and companies). All major field types are also supported, including multi-select picklists. You can only create 25 custom fields in the system though, which is sort of a con in our eyes.

Custom Stages and Statuses: Pipeline Deals puts a great emphasis on statuses and deals in their customization settings, which helps less experienced CRM admins make sure that they have their deal stages, people statuses and tags setup and ready to go.

REPORTS:

PD's reporting lets you configure and customize reports in the system with a drag and drop UI, as well as provides canned reports that are helpful, especially in terms of your pipeline. We call PD a "deals driven" system, where the focal point is really the deals object, and what stages the deals in your pipeline are at.

CONS:

Assignment and Workflow Rules (Lack of Automation): One downside to PD's customization is that there really isn't any functionality around automated lead assignment or workflow rules. This makes it tough for sales teams that may organize themselves by region or persona. Workflow would also be nice, if for nothing else than the alert your CRM users when something happens like a lead assignment or re-visit to your website.

SETUP, INTEGRATIONS AND APIs

Once you have Pipeline Deals configured and in place, you essentially have three options for getting your data into the system:

MANUAL IMPORT

You'll have to do constantly to keep your data up to date (ugh).

WEB-TO-LEAD FORMS

Allow you to place forms on your site which will feed this form data directly into the PD system.

AUTOMATED INTEGRATION

Will seamlessly sync data into PD from your marketing database, and then back again as it changes. We're partial to this option. ☺

PD does include an open API that is easy to work with: the API methods are all REST-ful and the data is in JSON format. Authentication is done with a simple API key at the time of this writing, though OAuth is planned for the near future, so keep an eye on that.

The Pipeline Deals API does have a rate limit on it, which is 10 API requests in any 5 second period. If you make more than that, then the API will error until the 5 seconds has passed.

Because the API is so straightforward and easy to work with, it got high marks from our developers who have written a PD connector on the Bedrock Data platform. When we found a small discrepancy in the API docs, their developers were quick to respond and happy to help us.

If you'd like to integrate PD with your other existing business systems cheaply and easily, then give Bedrock Data a shot.

INTEGRATING PD WITH YOUR MARKETING SYSTEM

Generally speaking, email marketing and marketing automation applications either help you generate leads, and you're going to want to load those leads into Pipeline Deals.

At the "top of the funnel" your marketing systems is probably what you want to use to route leads through your website using landing pages that may be configured in your marketing system. These leads that you're generating will automatically feed into PD, where they will get picked up by your sales reps.

Another powerful aspect of a bi-directional integration between PD and your marketing system is the automation of your marketing campaigns based on data from Pipeline Deals.

Systems like HubSpot, Infusionsoft and Marketo allow you to not only add records to Pipeline Deals, but also sync data from PD back to these systems, triggering campaigns right from Pipeline Deals.

HERE'S AN EXAMPLE:

- Contact converts on a website form to download a whitepaper.
- Integration system syncs this contact as a Person and Company to Pipeline Deals.
- Deal is created in Pipeline Deals and worked by a sales rep on your team.
- Changes to the Company, Person and Deal data syncs back to the marketing system by the integration system, triggering pre-defined campaigns.
- Deal status (including Won deals) syncs back to the marketing system, informing marketing analytics.

INTEGRATING PD WITH YOUR FINANCE SYSTEM

Financial and Support system integrations help you to inform your sales reps who are using Pipeline Deals. You can inform them about customer status, as well as the actions your customers are taking in terms of payment. Let's take a deeper look:

Financial integrations sync data from finance applications to Pipeline Deals. These integrations can help you to sync critical data about customers, contacts and payments (invoices) from your financial system into Pipeline Deals.

They can also automate the creation of invoices and updating of customer data in your financial system based on changes that happen in Pipeline Deals. Popular finance systems that you can integrate with Pipeline Deals include Quickbooks, Freshbooks, Xero and Recurly.

Let's take a look at what a financial system integration with Pipeline Deals might look like:

- Person record is created in Pipeline Deals, along with a Company.
- Company and person data is synced to Finance system as a new Account or Customer record (with no invoices or payments due yet).
- Deal is created in Pipeline Deals, then worked to a "Won" state.
- Closed/Won deal from Pipeline Deals syncs to your finance system and creates a new invoice waiting for fulfillment.
- Updates on that invoice or customers in your finance system, such as payments, or lack of payment can create Activities on Companies (and other objects) in Pipeline Deals.

PRICING AND SCALABILITY

PIPELINE DEALS' PRICING IS INCREDIBLY STRAIGHT-FORWARD:

$24

PER USER PER MONTH

TRY IT FREE

WHAT'S INCLUDED IN THIS PRICE? EVERYTHING.

- ✓ Month-to-month contract
- ✓ No hidden fees
- ✓ Free mobile access
- ✓ Unlimited data storage
- ✓ Bank-quality security
- ✓ Amazing support
- ✓ Open API for developers
- ✓ Google Apps integration

All versions of PD include API access, as well as access to their mobile app.

PD doesn't lock you in either: all subscriptions are month-to-month and include access to all parts of Pipeline Deals. We love the simple pricing!

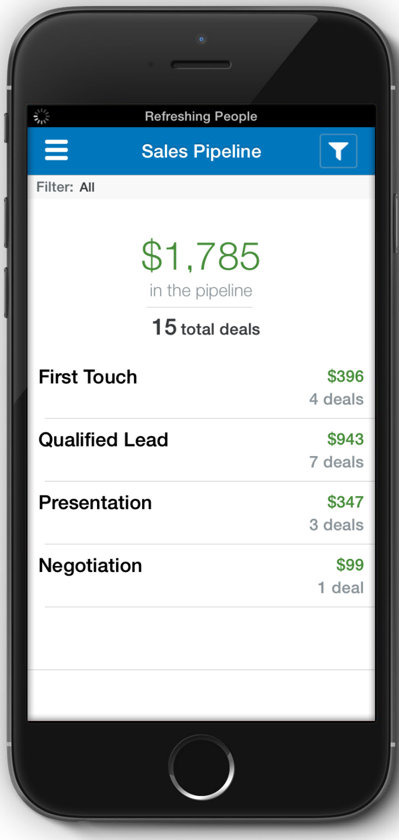
Scalability is a bit tougher for the system. Due to the lack of automation rules and ways to do lead assignment, using PD with a large sales team will get difficult quickly. For this reason, we only recommend PD to small teams, or teams that can work out of a lead pool and assign records to themselves (without fighting with one another in the process). ☺

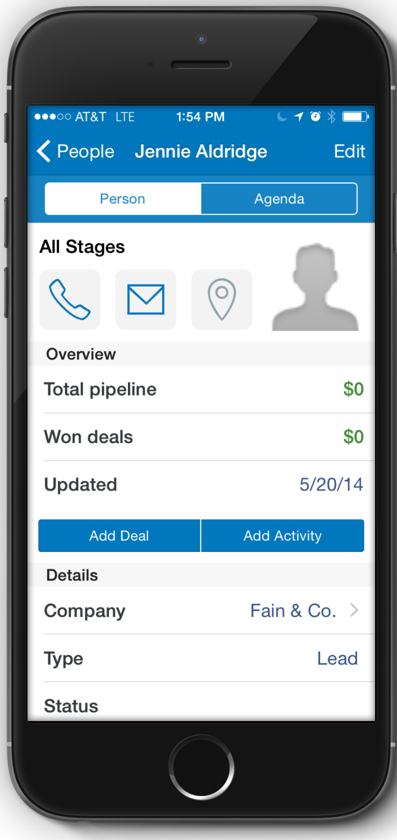
MOBILE APP

Pipeline Deals' mobile app is quite strong – we really liked it on both iOS and Android.

You can essentially create and edit all basic record types in PD on the mobile app, including creating new tasks and events. You can also see your pipeline in a nice UI in the mobile app.

No reports are available on the app at this time, and support for documents isn't there either.





APP STORE RATINGS:

I-PHONE: NO RATINGS YET

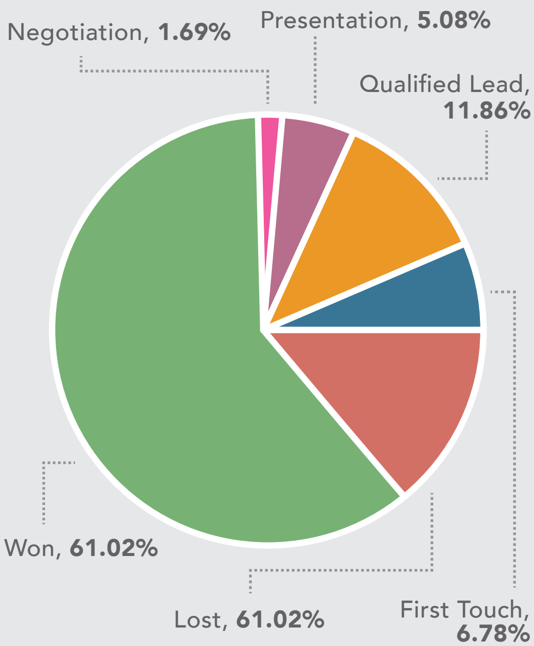
ANDROID: 4.25 OUT OF 5

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 useful.
- Make calls right from the app – routed through your phone app on your mobile device.
- Create deals and manage (edit) them through your sales pipeline.
- Add and view tasks and events so you always remember to follow up with a lead.

OVERALL TAKEAWAYS

DEALS BY STAGE



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. Pipeline Deals is clearly targeted at small sales teams, just due to the lack of automation features. PD themselves do a good job or promoting this idea, with articles clearly comparing themselves to Salesforce as a cheaper and simpler solution.

In terms of a system for small teams though, it really shines. The focus on your own sales pipeline (it's a "Deals" driven system), as well as the simplicity of the system makes it shine. It's the sort of system that gets out of your way and lets you close, and we really appreciated that.

So if you're a small team and want a simple CRM that will help you get organized and integrate your entire business, then you have to give Pipeline Deals a try.

Thanks for reading!