

A client of mine recently asked me about a CRM tool. What did I think was best for their firm? There are many factors to consider before choosing a CRM, including:

- Cloud vs. On-premise
- Define features and functionality you need
- Ensure the system integrates with other apps
- Request a demonstration, test drive, and free trial
- Choose an industry-specific vendor with local partners
- Ask if customization and training are available
- Is it intuitive?
- Require [GDPR](#), [CCPA](#), and [CPRA](#) privacy features

Once you have your list created, also ask yourself these questions [SuperOffice](#) posted.

1. What are the most inefficient processes in our business and what do we want to improve with a CRM system?
2. What operational processes and workflows do we lack and need to add?
3. Who in our company is going to use CRM? How many users do we need?
4. What other software do we want to integrate with a CRM system?
5. What is our budget?

I then turned to the [Association for Accounting Marketing](#) member forum, because this topic has been coming up each year for about five years. Below is a list of the top 10 CRM members have mentioned.

1. [HubSpot](#)
2. [SalesForce](#)
3. [Microsoft Dynamics CRM](#)
4. [ABLE](#)
5. [ContactEase](#)
6. [SugarCRM](#)
7. [Interaction](#)
8. [ZoHo](#)
9. [Delttek Vision](#)
10. [Redtail CRM](#)

U.S. News has a list of [top 10 CRM platforms](#) as well there is some overlap.

Top 10 CRMs for Accounting Firms

Before choosing a CRM, keep in mind that the most popular may not be the right fit for your firm. Do your research, ask around, and test drive a couple before making that final decision.