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[\[Read more on CRM for accounting firms.\]](#)

Nearly everyone has worked with Microsoft's Office products and Outlook, and Microsoft has done a good job with the completely online Office 365, keeping it familiar to long-time users, and continuing to add additional tools that are useful for professional firms of any size. While most firms likely consider it primarily for its email and calendaring functions, the system also offers CRM capabilities that can be used stand-alone, or in conjunction with more advanced CRM programs.

Strengths

- Directly integrates with other Microsoft Office applications: Excel, Word,

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Office 365 is quite a bit more than just the moving of Outlook, Word and the other applications to the cloud. The suite of office productivity programs have been expanded and new integrations have been made possible because of the cloud-based nature of the system.

The CRM functionality is primarily found in the People app section of Office 365, which offers a database for storing basic client contact data, plus additional information such as notes, photos and social media options. When working inside a Word document, Excel spreadsheet or other Office programs, users can assign the files to specific client contacts, so that when clients are looked up within the People app, the user can easily view associated files, emails and calendar items.

The SharePoint Online app in Office 365 is quite useful as well, providing users with a cloud-based document management system that can work with the other Office applications, and also allows simple document collaboration with clients. The system also includes deep search capabilities that can look through all associated documents, files and emails.

Summary & Pricing

Office 365 pricing is based on a per-user, per month subscription, with several package options that bundle various Office programs, like Outlook, Word and Excel. The base package, Office 365 Business Essentials, is priced at \$5 per user per month and includes web versions of Outlook, Word, Excel and PowerPoint, with a TeraByte of online storage and sharing.

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