CRM EVALUATION & SELECTION CHECKLIST

DATE: _____   S   M   T   W   T   F   S

BUSINESS NEEDS & GOALS

- ☐ Clearly define business objectives for CRM implementation
- ☐ Identify key challenges the CRM should solve
- ☐ Determine if an industry-specific CRM is required

CORE CRM FEATURES

- ☐ Sales force automation (lead tracking, pipeline management, opportunity tracking)
- ☐ Marketing automation (email campaigns, segmentation, performance analytics)
- ☐ Customer service tools (ticketing, self-service portals, knowledge base)
- ☐ Contact & lead management with advanced search and filtering

USABILITY & ADOPTION

- ☐ Intuitive interface with minimal learning curve
- ☐ Customizable dashboards and workflows
- ☐ Mobile accessibility for remote teams
- ☐ Role-based access and permissions

INTEGRATION CAPABILITIES

- ☐ Seamless integration with existing business tools (ERP, email, accounting software)
- ☐ Open API for custom integrations
- ☐ Third-party app marketplace for extended functionalities

SCALABILITY & PERFORMANCE

- ☐ Ability to scale with business growth (users, data, workflows)
- ☐ Cloud-based vs. on-premise deployment consideration
- ☐ Uptime guarantees and system reliability

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SECURITY & COMPLIANCE

- ☐ Data encryption and multi-factor authentication
- ☐ Compliance with GDPR, HIPAA, or industry regulations
- ☐ Regular security updates and patches

COST & ROI ANALYSIS

- ☐ Transparent pricing with no hidden costs
- ☐ Total cost of ownership, including licensing, implementation, and training
- ☐ ROI projections based on efficiency gains and revenue impact

VENDOR SUPPORT & TRAINING

- ☐ 24/7 customer support availability
- ☐ Onboarding and training resources (documentation, webinars, dedicated support)
- ☐ Ongoing updates and feature improvements

CRM TRIAL & TESTING

- ☐ Free trial or demo to assess usability
- ☐ Test CRM performance with real business data
- ☐ Gather feedback from key stakeholders

FINAL DECISION & IMPLEMENTATION

- ☐ Compare shortlisted CRMs and vendor reliability
- ☐ Create an implementation roadmap with migration strategy
- ☐ Train employees for smooth adoption

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