

CRM Selection Checklist Questionnaire

Please complete this checklist for each CRM we are considering. The more checks the better.



- ☐ Does this CRM have Good Support?
- ☐ What is the Setup Time and Usability?
- ☐ Does it Have all the Right Right Features?
- ☐ Does This CRM Meet Our Requirements with a Needs Analysis?
- ☐ Can this CRM Grow with our Business?
- ☐ Have We Read the Reviews?
- ☐ Does it Help Our Customer Lifecycle?
- ☐ Is The CRM Company Transparent?
- ☐ Is This A Smaller Brand That Tailors to Small Businesses?
- ☐ Does the CRM Eliminate Pain Points?
- ☐ Does it Works on Mobile?
- ☐ Are We Considering Things Other Than Features?
- ☐ Is There Data Security and Backups?
- ☐ Can You Customize Communication Channels?
- ☐ Can You Personalize Customer Messaging?
- ☐ Does this CRM Meet Our Data Policy Requirements?
- ☐ Can we Easily Find Relationship-Building Insights?

☐ Are There CRM Automation Features?

☐ Can We Keep Customer Data Up-To-Date?

☐ Can This CRM Follow Up With Customers?

☐ Are There Collaboration Features?

☐ Does it track Customer Response Times?

☐ Are There API Integrations?

☐ Does It Integrate With Our Business Goals?

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