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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