

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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