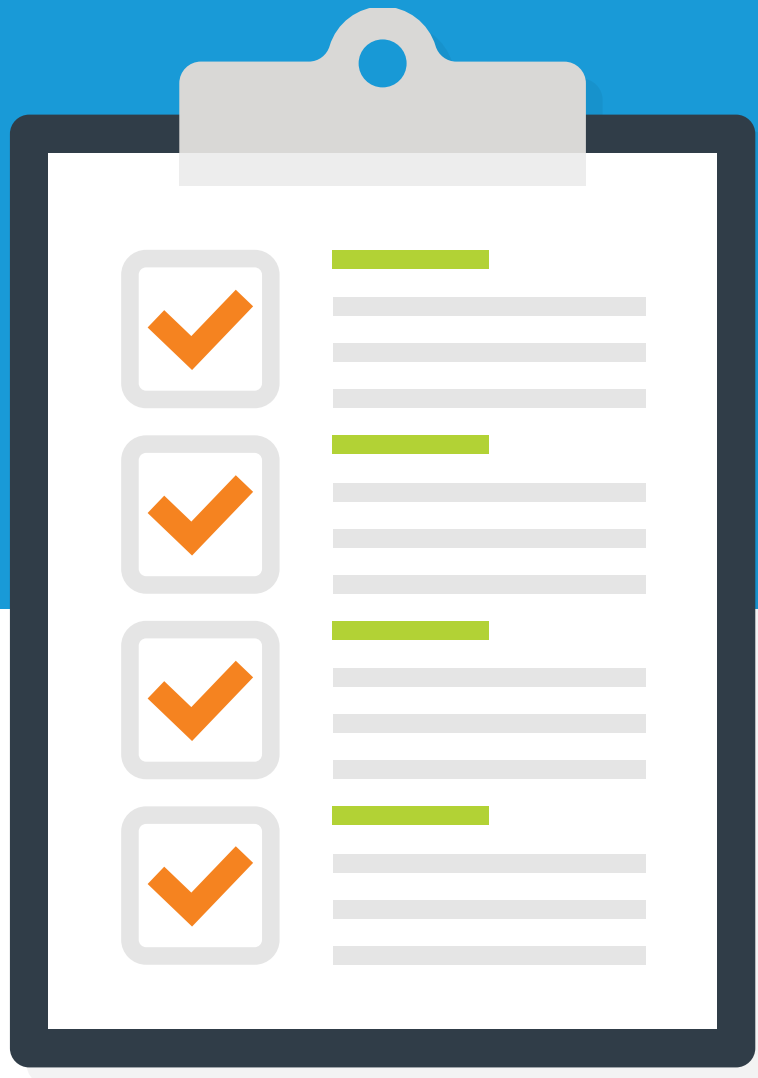# CRM Evaluation Checklist

Introduction

A great CRM system serves as the key that unlocks superior customer experience by typing your business together. When you look closely at various solutions, you'll find important differences in features and functionality.

This checklist will help you ask the right questions to narrow down your choice.

Table of Contents

1. Plan Your Architecture

In evaluating solutions, teams should inquire about code bases, extension frameworks, and ease of customization. These factors will affect development opportunities and costs.

2. Map Your Business Process

In addition to identifying essential processes that the CRM system will manage, use the CRM deployment as an opportunity to fix processes that don't work well. A CRM solution can help optimize customer-facing processes end-to-end, but it can't fix broken ones on its own.

3. Map the Customer Journey

Planning should include an agreed-upon definition of the optimal customer experience. A comprehensive customer journey map will help you to identify gaps and opportunities to re-work existing processes and add new workflows.

4. Prioritize Opportunities

Work with department heads to develop revenue and productivity opportunities at every stage. Once opportunities are flagged, study them for the ROI potential, compare them, and prioritize CRM expansion accordingly.

5. Align Sales and Marketing

Align sales and marketing around lead qualification definitions. With these definitions in place, the CRM system can help you to reduce pipeline waste by automating certain lead scoring and tracking activities.

6. Define the User Experience

Work with department heads and front-line workers to discover the insights, prompts and functionality that they need based on their role. A CRM system can integrate endless functionality and data across sales and service functions, so the project team must guard against overloading users.

7. Determine Applications and Data

Determine what applications and data sources are needed to empower users and maximize workflow efficiency. Note that edge applications (such as CPQ tools, field service, or contract management), integrated into a CRM can deliver more than four times the ROI of core CRM core applications.

Sales Automation

☐ What built-in capabilities does this solution provide for sales acceleration?

☐ Does the solution auto-populate records and forms?

☐ Can it ensure that contact data is accurate?

☐ How does the solution drive sales productivity? Can it automate the delivery of information about companies and influencers in its dashboards?

Lead Management

☐ Does the solution come with functionality to automate prospect outreach and lead qualification?

☐ What capabilities does it include for lead nurturing?

Case Management and Self-Service

☐ Does the solution deliver a comprehensive customer record to call center agents that includes data from the sales department?

☐ Does the solution automate call and email routing to support prioritization and reduce wait times?

Other Features & Functionality

Workflow & Automation

☐   Does the solution automate workflows?

☐   Does the solution offer automated call logging?

☐   What skills do we need to customize workflows?

☐   Does the automation support the entire customer journey, from acquisition to advocacy?

Integrations (Applications & Data Sources)

☐   How does this solution integrate with applications and data sources?

☐   What integration capabilities are built-in?

Usability / UX

☐   Is the default user interface consumer-grade?

☐   How consistent are the desktop and mobile interfaces?

☐   What work is involved in customizing an interface?

☐   Does the solution include offline mobile capabilities?

Relationship Intelligence

☐   Will the solution help accelerate call preparation time by providing associates with all the customer contact and social network information they need with just a name and email?

☐   Will the solution enable us to spend less time on research and maintenance so that we can spend more time getting to know our customers?

Customization & Extension Platform

☐ How is the platform optimized for extensibility and customization?

Code Base / Source Code Access

☐ Does the solution provide access to the full source code?

☐ Is the code base consistent across all modules?

☐ Is the solution written in a proprietary language?

☐ What expertise and tools will we need to customize the solution?

Application Hosting

☐ What are the options for hosting the application?

☐ Can we choose where our data is stored?

☐ Is there any charge for using local storage or a public cloud?

☐ Is there a charge if we choose to relocate our data?

Single or Multi-tenant Software

☐ Do we have control of our own application version?

☐ Do we schedule our own updates, or does the vendor set the migration schedule?

Security, Pricing & Vendors

Security & Compliance

- ☐ Can this solution meet our data security and privacy requirements?

- ☐ Does this solution provide the governance tools we need?

- ☐ Does this solution enable us to meet our regulatory and compliance requirements?

Pricing / Total Cost of Ownership (TCO)

- ☐ What are the pricing models and levels?

- ☐ Are there any upcharges, additional product, server license or maintenance charges?

- ☐ What other charges and fees might we incur over the lifetime of this solution?

- ☐ Are there charges for usage above preset limits and for storage of files?

- ☐ Are there charges for integrating applications and data sources?

- ☐ Are there limits on API calls?

Vendor Requirements

- ☐ Do they provide a knowledge base, case portal, or other online resources?

- ☐ Do they offer packaged connectors to critical features?

- ☐ How broad/deep is their ecosystem? Are they part of a wider network of deployment partners?

- ☐ What type of customer support is included with the solution? So they offer extended phone-based technical support packages?

sugarcrm