

CRM Checklist for Success

What types of pain points or problems are you trying to solve?

- ☐ Information is spread out through multiple software platforms.
- ☐ Current solutions are too expensive.
- ☐ No complete view of contact and info.
- ☐ We want to integrate our CRM with all of our different systems.
- ☐ My sales team won't adopt the CRM.

Customer Service Features:

- ☐ Service contract storage.
- ☐ Linking of service contracts to accounts.
- ☐ Bug tracking.
- ☐ Automatic bug creation from cases.
- ☐ Automatic bug creation from emails.
- ☐ End-to-end case management.
- ☐ Track resources & billable hours specific to cases & work orders.
- ☐ Automatically create articles from service cases.

Marketing Automation Features:

- ☐ Automated lead capture from your website.
- ☐ Automated email followups & workflow.
- ☐ Mass emailing.
- ☐ Create nurture/drip email campaigns.
- ☐ Capture leads & automatically assign to salesperson or target lists.
- ☐ Campaign activity & reporting

Do you Need to Customize or Integrate Your CRM?

- ☐ API and development support.
- ☐ Custom reporting and views.
- ☐ Customizable dashboards.
- ☐ Custom templates and document library.
- ☐ Currency and multi language support.
- ☐ Microsoft Outlook Integration.
- ☐ GoToMeeting Integration.
- ☐ Google Apps Integration.
- ☐ DropBox Integration.
- ☐ QuickBooks Integration.
- ☐ Content Management System Integration.
- ☐ Riva Integration.
- ☐ Magento eCommerce.

Contact and Sales Management Features:

- ☐ Capture multiple contacts & information for each organization.
- ☐ Centralized system to manage entire sales & contact database.
- ☐ 360 degree view of customer.
- ☐ View detailed contact & lead histories with all sales activities.
- ☐ Sort, filter & group data & create custom reports.
- ☐ Segment & manage all lead & contact lists.
- ☐ Sales forecasting with opportunities & pipeline management.
- ☐ Assign contacts & leads to sales representatives.
- ☐ Prioritize opportunities & leads.
- ☐ Drag & drop calendar for calls & meetings.
- ☐ Sync data across all mobile devices.

Social Media Features:

- ☐ Ability to link contacts to social media profiles.
- ☐ Follow organizations social media profiles.
- ☐ Interact with leads & customers on social media.

Project Management Features:

- ☐ Project tracking with gantt charts & multiple views.
- ☐ Project tracking with task lists.
- ☐ Assignment of projects to specific user or role.
- ☐ Resource and value of projects.
- ☐ Expected revenue of projects.
- ☐ Employee expense reports for specific projects.
- ☐ Integrated timesheet & timesheet management.
- ☐ Project templates for common types of projects.
- ☐ Shared calendars for scheduling & resource allocation.
- ☐ Calendar integration with iCal & Google Calendar.

Do you Need to Customize or Integrate Your CRM?

- ☐ Low training time.
- ☐ Online Knowledgebase & documentation.
- ☐ Online Help Forum.
- ☐ Data Import.
- ☐ Cloud Service.
- ☐ On premise Service.
- ☐ High Rate of User Adoption.
- ☐ Free Trial (no credit card required).
- ☐ All features included in costs (no hidden fees).
- ☐ Affordable.
- ☐ Video tutorials.