



# The Ultimate CRM Checklist for Your Business



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# 01 Introduction

As you set out on your journey to find the perfect CRM software for your business, you will notice that the market is flooded with numerous CRM tools.

Some could be mainstream CRM systems that are more widely known, while some could have just the necessary (but limited) capabilities. But, the perfect CRM for any business lies in the thin line between the two categories.

It should be suitable for your needs, easy to deploy and use, with a pricing plan for businesses of any size. And more importantly, provide advanced capabilities as they grow into enterprises.

But, despite the variety of CRMs in the market, a **Forrester report** shows that a shocking 2 out of 3 decision-makers become dissatisfied and plan to change their CRM within two years.



**2**  
out of 3

**decision-makers  
become dissatisfied**

(Forrester Research)

## The result?

Circling back to the expensive and challenging task of finding and implementing a new CRM.

So, choosing the right CRM software for your business is one of the most crucial decisions you will ever make. With this pressure on your shoulders, how do you ensure you don't invest in the wrong CRM?

Here is a CRM checklist that you can tick your way through CRM evaluations.

## 02 Why Do CRMs Fail?

Before we dive into the checklist, let's take a look at why exactly CRMs fail for businesses. This will help you cover the bases and create a foolproof plan.



### 1. Lack of CRM Planning

Whether you are buying a CRM for the first time or plan to replace your existing system, you need a detailed plan of action. Without this, you will find it difficult to

- Attribute to how exactly it fits into your sales strategy
- Scale the CRM adoption across your business
- Establish a consistent buyer experience.

Ultimately, you'll be discontented with the tool and start looking for a new one.

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## What you can do about it:



### a. Set your business objective:

The reason why you are on the lookout for a CRM software is to solve your business challenge.

It could be to improve sales productivity, increase revenue, retain existing customers, etc. When you list your business objectives, you will know precisely what you want in a CRM software.



### b. Create a solid CRM Strategy:

A CRM strategy combines your sales process with the CRM tool. In other words, every functionality of a CRM tool is linked to a part of your sales process. For example, you may use the sales sequences feature to run your follow-up emails or workflows to automate welcome emails and reminders.

For a step-by-step guide to creating a CRM strategy, you can visit [this article](#).



### c. Identify the metrics:

The only way to know if the CRM is giving you the desired results is by tracking those metrics you want to improve. As you list down your expectations from the CRM, tie it to a [specific metric](#) and assign a realistic growth percentage to it.

## Create a Solid CRM Plan:

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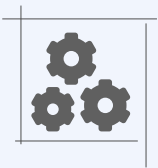
1. Set a business objective
2. Develop a CRM strategy
3. Identify key metrics



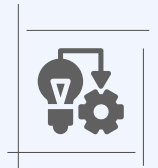
## 2. Poor implementation:

Without a proper implementation plan, you might not be able to set up the CRM the way it is intended, leading to poor adoption rates.

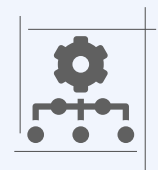
### What you can do about it:



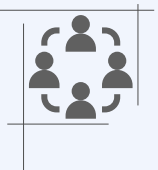
**a.** Verify if the CRM has integrations with the critical tools in your business, such as marketing automation, helpdesk, invoicing, etc.



**b.** Create a data migration plan. Most CRMs allow you to import data from spreadsheets or other CRMs. Have this tested during your trial period to ensure a smooth transition.



**c.** Ensure that the CRM vendor supports you through the implementation process. Some vendors charge you for the implementation, while others offer to do it for free. So keep an eye out for any hidden charges in the form of implementation.



**d.** Have a dedicated team to set up and onboard your salespeople.

# CRM Implementation Plan:

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1. Does the CRM integrate with your business tools?
2. Do you have a data migration plan?
3. Would CRM vendor support you with implementation?
4. Do you have a dedicated implementation team?





### 3. Low adoption:

A CRM is a tool. Hence, its effectiveness depends on how your teams use it.

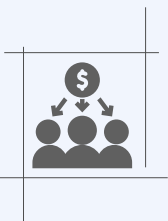
If your sales teams cannot use it effectively, it would end up being a data dump. The insufficient and incomplete data produces inaccurate and skewed reports leading to poor decision making.

#### What you can do about it:



**a.** Pick an easy-to-use CRM:

Most salespeople have a love-hate relationship with CRM that is not made better by complex CRM systems. So, look for an easy-to-use CRM that enables your teams to get work done without having to wander around the system



**b.** Involve key customer-facing teams/stakeholders:

Include your sales and marketing team while narrowing down a CRM. Most times, the teams which will actually be using the CRM don't have a say in the decision-making process and are forced to use a tool that lacks the key functionalities that they require.

Before choosing a CRM, get inputs from all the teams (sales, marketing, and support) on what they would like to achieve using a CRM.



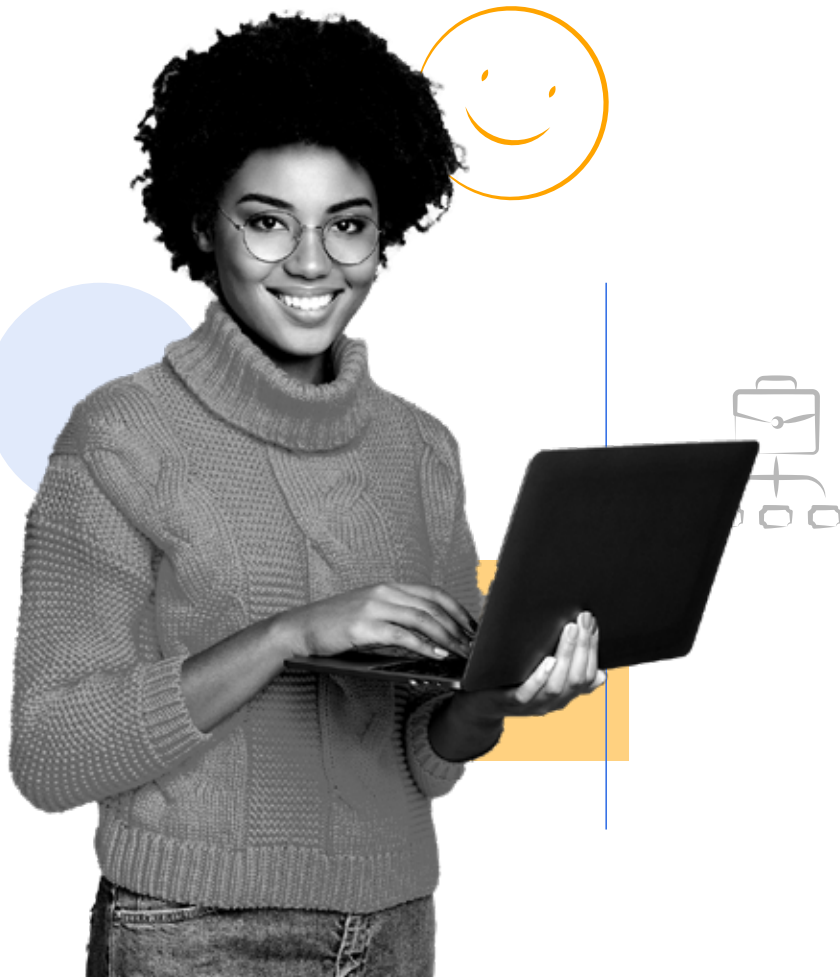
**c.** Create a sales onboarding process:

Have an onboarding plan in place, with tutorials, webinars, and training sessions on the most helpful features.

## Improve CRM Adoption:

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1. Pick an easy-to-use CRM
2. Involve all stakeholders
3. Support through CRM onboarding



# 03 CRM Checklist



## The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

### 01 Affordability & Scalability

<b>Free Trial Period</b>			
<b>Subscriptions</b>	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual
<b>Additional Cost</b>	<input type="checkbox"/> Training <input type="checkbox"/> Implementation <input type="checkbox"/> Data migration <input type="checkbox"/> Customization <input type="checkbox"/> Support	<input type="checkbox"/> Training <input type="checkbox"/> Implementation <input type="checkbox"/> Data migration <input type="checkbox"/> Customization <input type="checkbox"/> Support	<input type="checkbox"/> Training <input type="checkbox"/> Implementation <input type="checkbox"/> Data migration <input type="checkbox"/> Customization <input type="checkbox"/> Support
<b>Pay as you grow plans</b>			
<b>No data migration to upgrade plans</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 02 Ease of use

<b>Implementation Period</b>			
<b>Implementation team required</b>			
<b>Onboarding timeline</b>			
<b>User learning curve</b>			
<b>Customizable to existing sales process</b>			
<b>Customer Support</b>	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Chat	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Chat	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Chat



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 03 Essential Functionality

### Automated Data Entry

<b>Web to lead capture</b>			
<b>Lead enrichment</b>			
<b>Auto lead assignment</b>			
<b>Lead behavioral segmentation</b>			
<b>Lead nurturing campaigns</b>			
<b>Sort, filter and group data</b>			
<b>Import data from spreadsheets</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 03 Essential Functionality

### Contact Management

<b>360-degree contact view</b>			
<b>Notes, tasks and appointment</b>			
<b>Chronological view of recent activities</b>			
<b>Contact engagement scoring</b>			
<b>Website visitor tracking</b>			
<b>Web application tracking</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 03 Essential Functionality

### Pipeline Management

<b>Visual sales pipeline</b>			
<b>Multiple sales pipeline</b>			
<b>Deal prediction</b>			
<b>Deal insights</b>			
<b>Deal-related reports</b>			
<b>Revenue forecasting</b>			
<b>Multiple currency</b>			
<b>Sorts, filter, and group based on deal-value and deal-stage</b>			



# The Ultimate CRM Checklist

CRM 1  
Name:

CRM 2  
Name:

CRM 3  
Name:

## 03 Essential Functionality

### Email Management

<b>2-way sync</b>			
<b>Common team inbox</b>			
<b>Bulk email</b>			
<b>Email templates</b>			
<b>Email forwarding</b>			
<b>Email Scheduling</b>			
<b>Email personalization</b>			
<b>Real-time email alerts</b>			
<b>Email performance reports</b>			





# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 03 Essential Functionality

### Salesforce Automation

Sales sequences			
Workflows			
Configure, Price, Quote (CPQ)			

### Reports and Analytics

Standard reports			
Inbuilt report templates			
Advanced (custom) reports			
Reports scheduling			
Export and share reports			
Real-time dashboards			
Custom dashboards			



# The Ultimate CRM Checklist

CRM 1  
Name:

CRM 2  
Name:

CRM 3  
Name:

## 04 Omnichannel Engagement

	CRM 1 Name:	CRM 2 Name:	CRM 3 Name:
<b>Built -in phone</b>	<input type="checkbox"/> Custom greetings <input type="checkbox"/> Call recording <input type="checkbox"/> Voice mails <input type="checkbox"/> Buy local and toll-free numbers	<input type="checkbox"/> Custom greetings <input type="checkbox"/> Call recording <input type="checkbox"/> Voice mails <input type="checkbox"/> Buy local and toll-free numbers	<input type="checkbox"/> Custom greetings <input type="checkbox"/> Call recording <input type="checkbox"/> Voice mails <input type="checkbox"/> Buy local and toll-free numbers
<b>Built-in chat</b>	<input type="checkbox"/> Chat campaigns <input type="checkbox"/> Chat assignment rules <input type="checkbox"/> File attachments <input type="checkbox"/> Chat conversations	<input type="checkbox"/> Chat campaigns <input type="checkbox"/> Chat assignment rules <input type="checkbox"/> File attachments <input type="checkbox"/> Chat conversations	<input type="checkbox"/> Chat campaigns <input type="checkbox"/> Chat assignment rules <input type="checkbox"/> File attachments <input type="checkbox"/> Chat conversations
<b>Facebook Messenger</b>			
<b>WhatsApp Business</b>			
<b>Apple Business Chat</b>			
<b>SMS</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 05 Customization

<b>Role-based access</b>			
<b>Field permissions</b>			
<b>Custom fields</b>			
<b>Custom formula and lookup fields</b>			
<b>Custom modules</b>			
<b>Custom sales activities</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 06 Mobile CRM

<b>Mobile App</b>			
<b>Mobile push notification</b>			
<b>Real-time data sync</b>			
<b>Contacts</b>			
<b>Deals</b>			
<b>Email</b>			
<b>Tasks, appointments, notes</b>			
<b>Auto call log</b>			
<b>Meeting location navigation</b>			



# The Ultimate CRM Checklist

CRM1  
Name:

CRM2  
Name:

CRM3  
Name:

## 07 Integrations

<b>Marketplace</b>			
<b>APIs and SDKs</b>			
<b>Zapier</b>			
<b>Google Apps</b>			
<b>Office 365</b>			
<b>Helpdesk</b>			
<b>Marketing Automation</b>			



**Compare CRMs**

and start filling in your checklist right away.

**Looking for an all-in-one CRM  
that checks all boxes?**

Try Freshsales

**SIGN UP  
FOR FREE**

