CHECKLIST

The Ultimate CRM Checklist for Your Business

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, and have a pricing plan for businesses of any size. And, more importantly, it should 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. 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.

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 planning to replace your existing system, you need a detailed action plan. 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.

What you can do about it:

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.

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.

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 your expectations from the CRM, tie it to a specific metric and assign a realistic growth percentage.

Related Article: A step-by-step guide to creating a CRM strategy.

2 Poor implementation

Without a proper implementation plan, you might not be able to leverage the best out of your CRM and use it as intended, leading to poor adoption rates.

What you can do about it:

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

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.

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

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

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:

Pick an easy-to-use CRM

Most salespeople have a love-hate relationship with a CRM. So, look for an easy-to-use CRM that enables your teams to get work done without having to wander around the system.

Involve key customer-facing teams/stakeholders

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

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

Create a sales onboarding process

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

The Ultimate CRM Checklist

	CRM 1 [Name:]	CRM 2 [Name:]	CRM 3 [Name:]

1 Affordability & Scalability

Free Trial Period			
Subscriptions	☐ Monthly ☐ Quarterly ☐ Annual	☐ Monthly ☐ Quarterly ☐ Annual	☐ Monthly ☐ Quarterly ☐ Annual
Additional cost	☐ Training ☐ Implementation ☐ Data migration ☐ Customization ☐ Support	☐ Training ☐ Implementation ☐ Data migration ☐ Customization ☐ Support	☐ Training ☐ Implementation ☐ Data migration ☐ Customization ☐ Support
Pay-as-you-grow plans			
No data migration to upgrade plans			

2 Ease of use

Implementation period			
Implementation team required			
Onboarding timeline			
User learning curve			
Customizable to existing sales process			
Customer Support	☐ Email ☐ Phone ☐ Chat	☐ Email ☐ Phone ☐ Chat	☐ Email ☐ Phone ☐ Chat

3 Essential Functionality

Automated Data Entry

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

Contact Management

360-degree contact view			
Kanban view of contact data			
Notes, tasks, and appointment			
Chronological view of recent activities			
Contact engagement scoring			
Website visitor tracking			
Web application tracking			

Pipeline Management

Visual sales pipeline			
Multiple sales pipeline			
Deal prediction			
Deal insights			
Deal-related reports			
Revenue forecasting			
Multiple currencies			
Sorts, filters, and groups based on deal value and deal stage			

Email Management

2-way sync			
Common team inbox			
Drag-drop email editor			
Bulk email			
Email templates			
Email forwarding			
Email Scheduling			
Email personalization			
Real-time email alerts			
Email performance reports			

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			

4 Multi-channel Engagement

Automated Data Entry

Built -in phone	☐ Custom greetings ☐ Call recording ☐ Voicemails ☐ Buy local and toll-free numbers	☐ Custom greetings ☐ Call recording ☐ Voicemails ☐ Buy local and toll-free numbers	☐ Custom greetings ☐ Call recording ☐ Voicemails ☐ Buy local and toll-free numbers
Built-in chat	☐ Chat campaigns ☐ Chat assignment rules ☐ File attachments ☐ Chat conversations	☐ Chat campaigns ☐ Chat assignment rules ☐ File attachments ☐ Chat conversations	☐ Chat campaigns ☐ Chat assignment rules ☐ File attachments ☐ Chat conversations
Facebook Messenger			
WhatsApp Business Chat			
Apple Business Chat			
SMS			

5 Customization

Role-based access			
Field permissions			
Custom fields			
Custom formula and lookup fields			
Custom modules			
Custom sales activities			

6 AI

AI-based contact scoring			
Next best action suggestion			
Out-of-office detection			
Sales emails generation			
Deal insights			
Forecasting insights			

7 Mobile CRM

Mobile App	☐ Android ☐ iOS	☐ Android ☐ iOS	☐ Android ☐ iOS
Mobile push notification			
Real-time data sync			
Contacts			
Deals			
Email			
Tasks, appointments, notes			
Auto call log			
Meeting location navigation			

8 Integrations

Marketplace			
APIs and SDKs			
Zapier			
Google Apps			
Office 365			
Helpdesk			
Marketing Automation			

Compare CRMs and start filling in your checklist right away.

We're always there to help you with your queries.
If in doubt, feel free to reach out to us at **support@freshservice.com**

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