

## CRM Platform Selection

*Have you tested 3 different options for your CRM?*

*Which was your favourite and why?*

*Is it easy and intuitive to set up?*

*Is it easy to use on a daily basis?*

*Were you given a comprehensive overview of functionality?*

*Was this tailored to your specific use case or generic?*

*Will it scale and grow with your business requirements?*

*Does it allow you to develop a connected system?*

*Can you integrate your email and calendars? i.e Office365 / Google*

*Does it allow you to report and measure your key metrics?*

## Data Import & Management

*Does it allow you to import existing data?*

*Have you cleaned your data prior to importing it, so you are starting with good quality data?*

*How many records are you importing?*

*Do you get charged per 1000 records?*

*Can you segment your audiences into lists?*

*Is there a limit on email sends per month?*

*Do you have a source of live data connected to your CRM i.e ZoomInfo*

*What tools do you use for reporting?*

*Do you use any dashboard software?*

## Functionality – What tools do you need?

### Marketing Tools

*Landing page tools?*

*Email Marketing tools?*

*Social Media Management tools?*

*Paid Ad Tools?*

*Marketing Automation & Workflow tools?*

### Sales Tools

*Sales Pipeline?*

*Task Management?*

*Meeting Management?*

*Sales Email Sequence Automation?*

### Support & Service Tools

*Customer Support Tickets?*

*Feedback surveys?*

*Knowledgebase?*

### Website Tools

*Can you host your website on the system?*

*Can you host a blog?*

*Do you have SEO tools?*

*Do you use website analytics?*

*Chat Bot / Live Chat tools?*