

CRM Application & Vendor Selection Checklist

Under general business requirements, you should consider and evaluate these factors:

- 1) Ability to Connect Offline
- 2) Accounting System Integration
- 3) Activity Planning & Tracking Capabilities
- 4) Customization of Reports
- 5) Exchange Server Integration
- 6) Google Apps Integration
- 7) Google Maps Integration
- 8) Lotus Notes Integration
- 9) Microsoft Excel Import/Export
- 10) Microsoft Word Integration
- 11) Mobile Access Capabilities
- 12) Outlook Calendar Integration
- 13) Outlook Email Integration
- 14) Secure Web or Other Remote Access Options
- 15) Shared Calendars Functionality
- 16) Workflow Automation

Under technical requirements, you should consider and evaluate these factors:

- 1) Communications Templates Creation / Mgmt. Capabilities
- 2) Customization Capabilities
- 3) Data Management Capabilities
- 4) Desktop Administration Capabilities
- 5) Email Administration Capabilities
- 6) Integration with other Applications
- 7) Manage Users Capabilities
- 8) Mobile Administration Capabilities
- 9) Monitoring Capabilities
- 10) Offline Briefcase Configurations Management
- 11) Online Help Tools
- 12) Translation Customization Capabilities
- 13) User & Group Security Settings
- 14) User Training Capabilities, Tools, Etc.

Under contact management requirements, you should consider and evaluate these factors:

- 1) Account History & Tracking
- 2) Advanced Search
- 3) Bounced Contacts Management Capabilities
- 4) Call/Email History & Tracking
- 5) Contact Hierarchy Management
- 6) Customizable Objects & Fields
- 7) Customizable User Interface
- 8) Important Accounts and Contacts
- 9) List Building & Management
- 10) Mail Merge for Letters and Faxes
- 11) Mass Email Recipient Selection and Management
- 12) Sync to Lotus Notes

- 13) Sync to Outlook
- 14) Time/Date Stamped Notes

Under customer services and support requirements, you should consider and evaluate these factors:

- 1) Billable Time Tracking
- 2) Case Monitoring Tied to Service Level Agreements
- 3) Case Routing & Escalation
- 4) Case Customization Options
- 5) Case/Ticket Management
- 6) Customer Self-Service Portal
- 7) Customer Service Dashboard
- 8) Customer Service Reports
- 9) Knowledge Base

Under marketing requirements, you should consider and evaluate these factors:

- 1) Budget & Expense Monitoring
- 2) Marketing Automation / Email Integration
- 3) Campaign Dashboard
- 4) Campaign Management
- 5) Campaign Response Metrics
- 6) Campaign ROI Measurement
- 7) Compliance with CAN-SPAM
- 8) Customer Segmentation & Profiling
- 9) Customer Survey Tools
- 10) Customizable Campaign Fields
- 11) HTML Email Marketing
- 12) Marketing Collateral Management
- 13) Web Lead Capture

Under sales requirements, you should consider and evaluate these factors:

- 1) Contact Center Features (IP-PBX integration)
- 2) Integration with Prospecting Tools
- 3) Lead Dashboards
- 4) Lead Management
- 5) Lead/Customer Mapping to Google Maps
- 6) Lead/Customer Route Planning to Google Maps
- 7) Lead Reports
- 8) Opportunity (funnel) Management
- 9) Partner Relationship Management
- 10) Sales Dashboards
- 11) Sales Process Methodology
- 12) Sales Reports
- 13) Territory Management Features



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