

# Recommendanda's CRM Buying Checklist



Before diving into your CRM purchase, ask yourself these key questions to ensure you're choosing the right fit for your business. As always, create your short list of CRMs to vet using [Recommendanda](#).

| No | Questions to ask and answer   | ✓ |
|----|---|---|
| 01 | <b>Understand Your Business Needs</b> <ul style="list-style-type: none"><li>• What are the core challenges we want to solve with a CRM?<ul style="list-style-type: none"><li>◦ Do we need better lead management? Enhanced reporting? Streamlined communication?</li></ul></li><li>• What workflows need to be automated or improved?<ul style="list-style-type: none"><li>◦ Do we have manual tasks that could benefit from automation?</li></ul></li><li>• What are the growth plans for the next 1-3 years?<ul style="list-style-type: none"><li>◦ Will the CRM scale with us? Can it accommodate our future needs?</li></ul></li></ul>  |   |
| 02 | <b>Feature Requirements</b> <ul style="list-style-type: none"><li>• Does the CRM have the features we need right now?<ul style="list-style-type: none"><li>◦ Think lead management, contact management, sales pipeline, marketing automation, reporting, etc.</li></ul></li><li>• Can the CRM integrate with other tools we use?<ul style="list-style-type: none"><li>◦ Does it integrate with your email platform, marketing automation tool, or other essential software?</li></ul></li><li>• Does it support multi-channel communication?<ul style="list-style-type: none"><li>◦ Can it track emails, social interactions, calls, etc. in one place?</li></ul></li><li>• What level of customization is possible?<ul style="list-style-type: none"><li>◦ Can you tailor the CRM to your unique business processes?</li></ul></li></ul> |   |
| 03 | <b>User Experience &amp; Adoption</b> <ul style="list-style-type: none"><li>• Is the CRM easy to use for all team members?<ul style="list-style-type: none"><li>◦ Does the interface make sense? Will your team be able to get up and running quickly?</li></ul></li><li>• Does it offer training and support?<ul style="list-style-type: none"><li>◦ Is there enough onboarding help available to ensure smooth adoption? Is there live support?</li></ul></li><li>• Can multiple users access and collaborate within the CRM?<ul style="list-style-type: none"><li>◦ Does the CRM allow for role-based permissions, team collaboration, and easy data sharing?</li></ul></li></ul>  |   |

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| 04 | <b>Data &amp; Reporting</b> <ul style="list-style-type: none"><li>• Does the CRM provide actionable insights through reporting?<ul style="list-style-type: none"><li>◦ Are there built-in reports, dashboards, and analytics to track your sales and marketing efforts?</li></ul></li><li>• How easy is it to extract or export data from the CRM?<ul style="list-style-type: none"><li>◦ Can you easily get the data you need or transfer it to other tools as needed?</li></ul></li><li>• How does the CRM handle data security?<ul style="list-style-type: none"><li>◦ Does it have encryption, data backups, and compliance with industry regulations (GDPR, etc.)?</li></ul></li></ul> |   |
| 05 | <b>Budget &amp; Pricing</b> <ul style="list-style-type: none"><li>• What is the cost of the CRM?<ul style="list-style-type: none"><li>◦ Does the CRM offer a pricing structure that fits your budget (monthly/annual plans)?</li></ul></li><li>• Are there any hidden fees?<ul style="list-style-type: none"><li>◦ Make sure to ask about implementation fees, additional user licenses, or charges for advanced features.</li></ul></li><li>• How does the CRM scale with your business?<ul style="list-style-type: none"><li>◦ Does the pricing model increase predictably with growth? Are you locked into long-term contracts?</li></ul></li></ul>                                      |   |
| 06 | <b>Vendor Reputation &amp; Support</b> <ul style="list-style-type: none"><li>• What's the reputation of the CRM vendor?<ul style="list-style-type: none"><li>◦ Do they have positive reviews, case studies, and testimonials from businesses similar to yours?</li></ul></li><li>• What level of customer support do they provide?<ul style="list-style-type: none"><li>◦ Do they offer 24/7 support? Are they responsive via email, chat, or phone?</li></ul></li><li>• Is there a community or knowledge base available for self-service?<ul style="list-style-type: none"><li>◦ Are there online resources to help you troubleshoot issues?</li></ul></li></ul>                          |   |
| 07 | <b>Future-proofing</b> <ul style="list-style-type: none"><li>• How often does the vendor release updates and new features?<ul style="list-style-type: none"><li>◦ Is the CRM evolving and improving over time to meet market needs?</li></ul></li><li>• Is there a roadmap for future development?<ul style="list-style-type: none"><li>◦ Does the vendor have a clear plan for innovation and feature enhancements?</li></ul></li></ul>  |   |

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| 08 | <b>Trial &amp; Implementation</b> <ul style="list-style-type: none"><li>• Is there a free trial or demo available?<ul style="list-style-type: none"><li>◦ Can you test out the CRM before committing? This is critical for evaluating fit and usability.</li></ul></li><li>• How long does the implementation process take?<ul style="list-style-type: none"><li>◦ What's involved in getting the CRM up and running, and do you have the resources to support the implementation?</li></ul></li><li>• Does the vendor offer implementation support or partners?<ul style="list-style-type: none"><li>◦ Will the CRM vendor help you integrate and set up the system, or do you need to hire a consultant?</li></ul></li></ul>  |   |
| 09 | <b>Team Testing &amp; Feedback</b> <ul style="list-style-type: none"><li>• Have you involved your team in testing the CRM?<ul style="list-style-type: none"><li>◦ Before fully committing, have different departments (sales, marketing, customer support, etc.) test the tool to ensure it meets their needs and is user-friendly for everyone.</li></ul></li><li>• What's the feedback from actual users?<ul style="list-style-type: none"><li>◦ Gather feedback from your team on their experience using the CRM. Do they find it intuitive? Are there any pain points that could impact their adoption?</li></ul></li><li>• Does the CRM facilitate collaboration across teams?<ul style="list-style-type: none"><li>◦ Ensure that the tool supports cross-departmental collaboration and communication, which is key for a smooth workflow.</li></ul></li><li>• Are there any specific customizations needed based on user feedback?<ul style="list-style-type: none"><li>◦ After testing, determine if any features or workflows need adjustments to fit the way your team works.</li></ul></li></ul> |   |

**Always consult Recommenda for your short list of vendor partners. We are here to help you make the smartest MarTech decisions.**