

10-Point CRM Buyer's Checklist

Avoid Costly Mistakes (Used by 12,000+ Businesses)

This comprehensive checklist helps you evaluate CRM solutions thoroughly before making a significant investment. Use it to avoid common pitfalls and find the perfect fit for your business needs.

1. Must-Have vs. Bloat Features

Evaluate if the CRM addresses your core business requirements without unnecessary features that increase complexity and cost.

- Define your essential features
 - Identify redundant functionalities
 - Calculate cost-per-useful-feature
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2. Hidden Pricing Analysis

Look beyond the advertised price to understand the true cost of ownership.

- Additional user fees
 - Storage and API call limits
 - Premium support costs
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3. Integration Compatibility

Ensure seamless connection with your existing business tools.

- Current tech stack compatibility
 - Native vs. third-party integrations
 - API limitations and costs
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4. Support Quality Assessment

Verify the quality and availability of customer support.

- Response time benchmarks
 - Support channels available
 - Self-service resources
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5. Long-term Cost Projection

Calculate the total cost of ownership over three years.

- User growth estimates
 - Feature upgrade costs
 - Training and maintenance expenses
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6. Migration Strategy

Plan for both implementation and potential future transitions.

- Data import process
 - Timeline estimation
 - Exit strategy planning
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7. Training Requirements

Assess the learning curve and training needs.

- Onboarding duration
 - Training resources provided
 - Ongoing support needs
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8. Security Standards

Verify security measures and compliance certifications.

- Data encryption standards
 - Compliance certificates
 - Security audit history
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9. Data Portability


Understand your options for data ownership and transfer.

- Export format options
 - Data retention policies
 - API access for migration
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10. Alternative Solutions

Compare with other options in your price range.

- Feature comparison
 - Cost analysis
 - User reviews and ratings
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 **Pro Tip:** Use this checklist as a scoring system. Rate each CRM solution from 1-5 on every point to make an objective comparison.