CRM Evaluation Checklist

A practical scorecard for small businesses comparing customer relationship management (CRM) systems. Use it to define requirements, compare vendors consistently, test real workflows, and document your decision.

Business / Team	_____
Evaluator	_____
CRM being evaluated	_____
Evaluation date	_____
Current system	_____

How to score

0 = Does not meet the requirement **1** = Weak **2** = Acceptable **3** = Strong **4** = Excellent / fully meets the requirement.

Mark critical requirements as **Must Have**. A high total score should not override a failed must-have requirement.

1. Business Fit & Usability

Requirement	Must Have	Score 0-4	Notes
Fits the size and complexity of our business	■		
Interface is understandable without extensive training	■		
Sales/service workflow can match how our team actually works	■		
Mobile access is sufficient for our team	■		
User permissions and roles fit our organization	■		
Vendor onboarding/help resources are adequate	■		

2. Contact, Lead & Pipeline Management

Requirement	Must Have	Score 0-4	Notes
Central contact/customer database	■		
Lead capture and assignment	■		
Custom pipeline stages	■		
Tasks, reminders and follow-up tracking	■		
Notes, activity history and communication visibility	■		

Requirement	Must Have	Score 0-4	Notes
Custom fields for information our business needs	■		
Duplicate-contact management	■		

3. Sales & Customer Communication

Requirement	Must Have	Score 0-4	Notes
Email integration or email logging	■		
Calling/SMS capabilities or integrations if needed	■		
Templates for common communications	■		
Automated follow-up options	■		
Appointment/calendar integration	■		
Team visibility into customer conversations	■		

4. Automation & Workflow

Requirement	Must Have	Score 0-4	Notes
Can automate repetitive tasks we actually perform	■		
Workflow triggers and actions are understandable	■		
Lead routing/assignment can be automated	■		
Notifications and reminders can be automated	■		
Automation can be tested before full rollout	■		
Human approval can remain in workflows where needed	■		

5. Reporting & Management

Requirement	Must Have	Score 0-4	Notes
Pipeline and deal reporting	■		
Lead-source reporting	■		
Sales activity reporting	■		
Conversion reporting	■		
Custom dashboards/reports where needed	■		
Data can be exported for independent analysis	■		

6. Integrations & Data

Requirement	Must Have	Score 0-4	Notes
Integrates with our email/calendar	■		
Integrates with our website/forms	■		
Integrates with accounting/payment systems if required	■		
Integrates with marketing/automation tools we use	■		
API/webhook/integration options are sufficient	■		
Importing existing customer data is practical	■		
Data export is available in a usable format	■		

7. Cost & Scalability

Requirement	Must Have	Score 0-4	Notes
Base subscription fits our budget	■		
Per-user pricing is acceptable	■		
Required features are included in the expected plan	■		
Implementation/migration costs are understood	■		
Usage, messaging, storage or add-on costs are understood	■		
Cost remains reasonable as users/contacts grow	■		
Upgrade path supports likely future needs	■		

8. Security, Reliability & Administration

Requirement	Must Have	Score 0-4	Notes
Access controls meet our needs	■		
Multi-factor authentication/security options are adequate	■		
Backup/data-retention approach is acceptable	■		
Administrative settings are manageable	■		
Vendor documentation/support is sufficient	■		
Business-critical data can be retrieved/exported if we leave	■		

Vendor Comparison Scorecard

After evaluating each CRM, summarize the results here. Use the same criteria and scoring approach for every vendor.

Category	CRM A	CRM B	CRM C
Business Fit & Usability			
Contact, Lead & Pipeline			
Sales & Communication			
Automation & Workflow			
Reporting & Management			
Integrations & Data			
Cost & Scalability			
Security & Administration			
Total score			
Any failed Must-Have?	Yes / No	Yes / No	Yes / No
Estimated monthly cost	$	$	$
Estimated annual cost	$	$	$

Real-World Trial Checklist

Before choosing a CRM, test it with a small real workflow rather than relying only on a feature list.

■ Import a sample of real contacts and verify field mapping.

■ Create a lead and move it through your actual pipeline stages.

■ Assign the lead to another user and verify notifications.

■ Create a follow-up task/reminder.

■ Send or log a customer communication.

■ Build one simple automation used by your business.

■ Generate a report a manager would actually use.

■ Test the mobile experience if staff work away from a desk.

■ Export sample data and verify that it is usable outside the CRM.

■ Confirm the plan tested includes the features you intend to buy.

Decision Summary

Preferred CRM: _____

Why it fits our business:

_____

_____

Must-have requirements confirmed: _____

Key limitations / risks:

_____

_____

Next step: ■ Trial further ■ Approve purchase ■ Compare another CRM ■ Do not proceed

Related Business Tools Lab Resources

Use this checklist alongside the Business Tools Lab Software Finder, Software Stack Builder, Software Budget Calculator, Sales & Lead Tracker, CRM comparison guides, and CRM & Sales business-tools category.

Important: This checklist is for general business organization and educational purposes only. CRM capabilities, pricing, security practices and plan limits can change. Verify current information directly with each provider before purchasing or migrating business data.