



Small Business CRM Evaluation Guide



Landscape Overview

CRM platforms were created to help businesses manage the complete customer lifecycle, from marketing, through sales to support.

Unfortunately, while marketing and support workflows have evolved into stand alone platforms like Marketo and Zendesk, not much has changed for sales.

Reps are still trying to work directly out of legacy CRMs that were not built around the core needs of a salesperson. As such, hundreds of point solutions have emerged, each seeking to solve a small piece of the sales performance puzzle, from email tracking to call dialing and reporting.

To fill the gaps in their own technologies, legacy CRM players have begun acquiring and/or integrating with these point solutions. Not only does this drive costs for businesses as they're forced to pay for additional licensing fees and API calls, but it also causes frustration for reps as they are forced to constantly move between systems. Ultimately, rep adoption and, subsequently, data capture suffer.

Now, a new generation of sales solutions is emerging. These platforms focus on providing sales teams with all the tools they need in a single platform, increasing adoption, productivity and data capture through mobility and sheer ease of use. In addition to providing superior lead management and sales force automation capabilities, they are able to process large volumes and varieties of data to provide scientific insights that accelerate performance.

Key Considerations

When evaluating a CRM or other sales platforms, it's important to ask the right questions to determine whether or not your solution of choice will empower your business to succeed. There are some key questions and pieces of functionality to consider:

- What's the average adoption rate among customers?
- What does the training and implementation process look like?
- How many supporting tools will my team need to use each day?
- Are there any limitations across mobile devices?
- Will I just get data, or will I get actionable sales insights?
- How easily can it connect to my company's existing systems?
- What resources does the vendor offer to support long-term success?

What to Watch out for

How can you tell if you're dealing with a next-generation sales platform and not a legacy CRM? Here are a few red flags that will help you separate the leaders of the pack from the legacy vendors:

- Need for third-party integration assistance
- App-exchanges to fill functionality gaps
- Lack of data warehousing
- Little focus on UX
- Minimal, list-like reports
- Low mobile app store ratings
- Strict API limitations
- High cost of ownership over time



RFP Template

To aid you in your evaluation process, we've created the below RFP template. Combining some or all of the questions covered in this template with your company's own unique requirements will help you conduct a more thorough investigation and ensure you're getting the right solution for your business.

🕒 LEAD TRACKING & MANAGEMENT	
Does your solution provide the ability to create and/or link directly to lead capture forms?	
Please describe your lead import and organization processes:	
How does your platform map individual contacts to company contacts?	
How does your solution distribute and prioritize leads? Does it provide lead scoring capabilities?	
Please describe the manner in which contact information is displayed and accessed:	
What are the ways in which contacts and accounts can be filtered, sorted and segmented?	
Please describe your platform's customization capabilities for the following: tags, fields, lead statuses, lead scoring and pipeline stages.	



⚙️ SALES FORCE AUTOMATION	
Is email communication automatically tracked and stored by your solution?	
Does your solution automatically log and record all phone calls?	
Please describe the breadth of notifications and real-time alerts offered by your solution. Are these customizable?	
Does your platform provide managers with the ability to prompt end-users to enter specific information and take particular actions when a new account is created or moved to a new stage of the pipeline?	
Does your platform support email merge tags?	

💰 SALES PRODUCTIVITY	
Do any of the following capabilities require the use of an app-exchange or third-party platform: emailing, call dialing, reporting, file sharing, workflow management or lead scoring?	
Does your solution offer built-in auto dialing?	
Please describe your document storage and file sharing functionality:	
Please describe the email capabilities within your platform:	
Is there a way to create and access email templates from within your platform?	
Please describe your task creation and management capabilities:	



 MOBILITY	
Do you provide a mobile web version of your platform or a native application?	
What is your mobile application rating in the app store?	
Is mobile access included in the licensing fee or is it an extra charge? How many devices are included?	
Is all desktop functionality available via mobile, including reporting and lead management? If yes, is there an extra cost? If no, what functionality is excluded?	
Is offline access available?	
Are alerts and notifications pushed to mobile?	
Is geolocation available for field reps?	

 DATA MANAGEMENT & REPORTING	
Please provide a plan/pricing breakdown for data storage, including any limitations:	
How frequently is data recorded, and for how long is this historical information stored?	
What is the typical process and timeline to migrate legacy data into your platform?	
What is the process for consolidating data from other business systems with your platform?	



Please describe any tools that you provide to aid in data cleanliness and accuracy:	
Please list the out-of-the-box reports provided by your solution:	
Does your solution offer a real-time insights dashboard? If so, please describe its contents:	
Please give an example of the kind of insights that can be expected from your platform's intelligence capabilities:	

↔ API

Please list the solutions that your platform currently integrates with:	
Does your platform limit the number of API calls that can be made in a given period of time or within a particular pricing plan? If so, what is the associated cost?	
Please describe the process for integrating your system with a new platform:	

🌐 IMPLEMENTATION, SUPPORT & SERVICES

Please provide an overview of your implementation process. What is the average time to go-live?	
Please list your levels of support and associated fees. What is your average time to resolution? Do you provide 24/7 live support to all customers?	
Do you provide an assigned Account Manager or Customer Success Representative to every client?	
Please provide a detailed breakdown of your pricing model:	



<p>What does the average total cost of ownership (TCO) look like for your solution over 5 years? Please provide a detailed breakdown that includes any fees associated with support, data storage, etc.</p>	
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🔒 SECURITY	
<p>Please describe your data encryption processes and protocols:</p>	
<p>How often is data backed up, and what is the process for recovering information in the event of server failure?</p>	
<p>Can multi-level user permissions be set and if so, what is the process for doing this?</p>	