

**Business Success with CRM Capabilities Checklist**

Company: \_\_\_\_\_ Contact: \_\_\_\_\_

Role w/CRM: \_\_\_\_\_ (Sales Rep, Sales Support, Sales Mgr., Customer Support other)

*Use the following checklist to help identify what capabilities of CRM – a 360-degree customer relationship and management system -- matter most to your organization.*

Capability	Rating of importance		
	Must Have	Nice to Have	Not Needed
<b>Contact/Account Management:</b> Manage lists of names of people (contacts) and organizations (business accounts), addresses, phone numbers, emails, etc.			
Identify and categorize people and companies by various types, subtypes, industries, SIC/NAICS codes, preferred method of contact, etc.			
Create dynamic groups of contacts and accounts using different criteria (filters) to generate segmented target lists.			
<b>Key Account Management:</b> Identify, prioritize, and communicate with key accounts.			
<b>Communications:</b> Schedule meetings, phone calls, and follow-up activities with prospects and customers.			
Email using Microsoft Outlook or Google Gmail, automatically saving the content and optional attachments to the contact and account in CRM to easily compile communications history.			
Identify various types of relationships/associations between contact and company accounts, including parent/subsidiaries.			
Identify contacts who have not been communicated with for xxx number of days by email, phone call, meeting, letter, etc.			
Create and manage templates for emails and correspondence			

Capability	Must Have	Nice to Have	Not Needed
<b>Accessibility:</b> Access the contact management/CRM system over an Internet connection 24x7x365.			
<b>Mobile:</b> Use smart phones and tablets on the go to find information and update the main CRM system information in real time.			
Translate voice notes into text for direct placement into CRM			
<b>Address management:</b> Identify multiple addresses for a contact or business account, including Billing, Shipping, Corporate, Home.			
<b>Lead management:</b> Perform mass import of leads from an electronic list (Excel) and assign to a sales rep for follow up.			
Import captured information from a website lead-generating page automatically into the CRM system.			
Qualify leads using a set of steps/questions before designating them as a qualified contact/company account.			
Link specific leads sources or marketing campaigns to new leads/business contacts for marketing performance analysis.			
<b>Quoting:</b> Create a quote with or without revision tracking for prospects or customers and send it by email as PDF.			
<b>Product Catalog:</b> Create a product catalog that uses items for quoting products/services or as opportunity line items.			
Provide discounting by product type, customer class or ad-hoc.			

Capability	Must Have	Nice to Have	Not Needed
<b>Opportunity Management:</b> Manage sales opportunities by tracking products/services of interest and identifying progress as the buyer moves through a sales process to close won/lost.			
Create revenue forecast reports and identify the stage of each potential sale (quote/opportunity)			
Create on-demand sales call reports of selling activity history held within the CRM for a prospect and customer.			
Generate sales opportunity progress reports: closed won/lost in last 30 days, opportunities in the pipeline over xxx days, new opportunities created in last 30 days, etc.			
Identify competitor strengths, weaknesses, and your selling strategy against per sales opportunity.			
Identify the products selected for won sales opportunities as company account assets (i.e. purchased products).			
<b>Marketing:</b> Send emails, newsletters, and other electronic content to prospects and customers with content specific to their interests. Run nurturing campaigns to stay 'top of mind.'			
Measure sales opportunity performance based on the lead source/marketing campaign that generated the interest.			
Provide sales reps with a ranked list of contacts showing warm and hot interest based on your communications' open and click rates.			
Show dashboards of marketing campaign results: number of opens, etc.			

Capability	Must Have	Nice to Have	Not Needed
Create a process to automatically schedule phone calls and meetings for sales reps based on campaign results so hot leads don't fall through the cracks.			
Send surveys to mine additional information and return it to the CRM for marketing and product development teams.			
Ability to bulk import lists of contacts or accounts			
Ability to search for duplicated contacts and accounts and merge records to retain history			
<b>Customer Service/Support:</b> Identify customer service and support issues (cases) and note next actions note final resolutions to build helpful support knowledge database for future calls.			
Identify trends of common customer service issues.			
Provide a business partner/distributor portal to manage sales.			
Provide a customer self-service portal which allows the customer to create a new case or view the status of open service cases.			
<b>Security/Permissions:</b> Restrict access of some CRM users to specific business accounts and related information.			
Hide certain CRM system functionality based on the user or group.			
Limit certain field information to specific users or groups of users. Example: don't show YTD sales history.			

Capability	Must Have	Nice to Have	Not Needed
<b>Outside System Integration Points:</b>			
Integrate with website lead capture and contact data forms directly updating CRM.			
View prior sales history from an accounting system. Such as showing product sales per customer with pricing information.			
Synchronize customer account information from accounting system to the CRM: credit balance, terms, 30/60/90 days aging.			
Integrate CRM with a document management /approval system			
Integrate CRM with phone system (CTI- computer telephony integration)			
Provide geocoding and location proximity search/driving directions for a set of conditions. Example: Show customers located within 20 miles of a sales rep's current location.			
Track time and billing activity to a project/job with milestones and categories of tasks.			
<b>Business Alerts/Notifications:</b> Send reports, alerts, etc. automatically, based on specific business events such as new accounts created, opportunity won, service cases closed.			
Have built-in BPM- business process (workflow) management.			
<b>Other Capabilities Not Specifically Mentioned Above:</b>			
Deployment: On-premise			
Deployment: Cloud			
Need to assess skills of end users in use of this CRM technology			

Capability	Must Have	Nice to Have	Not Needed
Need to assess the readiness of users and management to adapt to change			
Analyze current end-user technology devices used: PC/Mac, operating system version, web browser/version, etc.			
Automate operational processes/ work-flow relating to CRM to modify, improve, eliminate work.			
Create and manage business analytical dashboards			
Access CRM from Apple, MAC, IOS devices			
Access CRM from Android or Google devices			
Access resources like a support knowledgebase, an academy, community portal			
Access free 5-10-minute quick-start and how-to videos			
Are you using Microsoft Outlook OR Google Gmail?			
What is the accounting system used?			
What will be the data sources for populating CRM at start up?			
<b>List other capabilities not identified above but critical for your success with CRM</b>			