

CRM BUYER CHECKLIST

Section	Question	Yes	Notes
Leads & Speed	Can I see every active lead in one place?		
Leads & Speed	Does the system require next steps for each lead?		
Leads & Speed	Can I identify leads needing follow-up today?		
Leads & Speed	Will this improve response speed?		
Sales Process Control	Does it enforce a consistent sales process?		
Sales Process Control	Can I see where deals get stuck?		
Sales Process Control	Can I standardize sales activities?		
Sales Process Control	Will it improve team consistency?		
Estimating & Ordering	Can I create estimates quickly?		
Estimating & Ordering	Does it connect estimates to ordering?		
Estimating & Ordering	Does it reduce manual entry?		
Estimating & Ordering	Does it prevent ordering mistakes?		
Estimating & Ordering	Does it use property data (e.g., EagleView)?		
Team Visibility	Can all teams access the same information?		
Team Visibility	Does it eliminate status confusion?		
Team Visibility	Can I check job progress instantly?		
Follow-Up & Experience	Does it improve follow-up consistency?		
Follow-Up & Experience	Can I track customer communication?		
Follow-Up & Experience	Will it improve professionalism?		

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Integrations & Lead Flow	Do leads flow in automatically?		
Integrations & Lead Flow	Does it integrate with current tools?		
Integrations & Lead Flow	Does it reduce duplicate entry?		
Performance Tracking	Can I track lead sources?		
Performance Tracking	Can I measure conversions?		
Performance Tracking	Can I track rep performance?		
Ease of Use	Is it simple to use daily?		
Ease of Use	Can it be used in the field?		
Ease of Use	Will my team adopt it?		
Setup & Support	Is setup included?		
Setup & Support	Will contacts be imported?		
Setup & Support	Is training provided?		
Setup & Support	Is ongoing support available?		
Cost & Value	Are there hidden fees?		
Cost & Value	Are there per-user limits?		
Cost & Value	Will it deliver ROI?		