100+ Questions

CRM Consultants get paid to ask

A comprehensive Customer Relationship Management checklist designed to help prioritize your business drivers during the buying process

Choosing the best Customer Relationship Management solution for your company can be a challenge. With so many vendors trumpeting their products, it's easy to make a bad decision. To simplify the process, we've created this guide to help you determine your Customer Relationship Management needs, evaluate vendor capabilities and sidestep pitfalls in the selection process.

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CRM Evaluation Guide

► Introduction

Evaluating and selecting a CRM solution among so many vendors is a challenge. There are many ways to make a bad decision and only a few ways to make a good one. To help simplify this process, we've created this CRM Evaluation Guide which includes a comprehensive methodology and detailed CRM checklist, designed to help prioritize your business drivers and evaluate vendor capabilities.

► CRM Evaluation Guide Contents

> "I've evaluated the top 5 CRM systems, and Entellium is by far the easiest to use with no sacrifice on features."
>
> **Michele Devoll, CRM Deployment Consultant**

An interactive version of the CRM Checklist is available through your Entellium representative.

Decision Methodology

► A simple 6-step methodology to deliver speed and savings into your buying cycle. We do this by helping you better articulate & document your needs, assist you to prioritize, and get to this point in the quickest possible time with the least amount of effort.

Step 1: Determine Requirements and share them with potential vendors

a) Establish your business objectives
b) Crystallize your functional needs
c) Detail your technical requirements (integration with other platforms, etc..)
d) Determine which vendors have a good fit with your requirements

Step 2: Expect the vendor to prove they can really meet your requirements by:

a) Demonstrating capabilities that meet your base needs
b) Explaining how business objectives will be met or exceeded
c) Painting the extended vision of a successful CRM initiative
d) Describing how technical requirements will be satisfied
e) Explaining how their deployment process is pain free and avoids risk
f) Describing their support and training, and any additional costs associated with them
g) Describing their value proposition and ROI

Step 3: Finalize other considerations to get a complete understanding of:

a) How their company's revenue is derived (for example, professional service fees, license fees, hosting fees, etc.)
b) Total cost of ownership over a 3 to 5 year period
c) Vendor's product strategy and future target market to determine how it lines up with your business over the next 3 years (use objective sources)
d) What your long-term commitments to vendor on services will be
e) Service level standards for downtime, support, and data security

Step 4: Expect a vendor presentation of the final solution to your full buying team (senior management, etc..)

Step 5: Agree to deployment schedule and resources required internally to fully implement your system

Step 6: Deploy your chosen solution

By following this methodology you may be able to take weeks if not months off your buying cycle and see the real returns of your chosen system sooner.

CRM Checklist

► Introduction

There is base-line functionality that all CRM vendors will likely meet. This tool is designed to assist the buyer in determining how to approach the process of evaluating and differentiating CRM vendors in order to select the most effective solution.

Determine the importance of each feature for your solution. This will enable Entellium, or any other vendor, to show you how the proposed system matches and fulfills your requirements.

► Checklist Table of Contents

A) Solution Depth & Deployment Options
- Breadth of the application & deployment options

B) User Interface
- Ease of usability and related innovation around the interface

C) Activity Management
- Work can be thought of as a series of activities, some repetitive or pre-determined, some being ad hoc. CRM is no different so the strategic approach to Activity Management is vitally important for efficient and consistent results

D) Marketing Capabilities
- How the system handles sophisticated marketing functions across all the data

E) Customer and Contact Management
- Working with companies and individuals as the basis of CRM

F) Lead Management
- Leads and opportunities are typically dealt with in discreetly different ways by a sales & marketing organization. Questions on how powerfully and comprehensively the system deals with leads

G) Sales Process and Opportunity Management
- Sales Processes, developing opportunities through the process, and how the system deals with the diversity of process necessary for most companies

H) Tracking Revenue and Forecasting
- Managing sales is about activities but also about the results. How do you wish to deal with Forecasting and revenue determination, throughout the cycle?

I) Customer Care
- Check functionality for help desk, Customer Care and complex incident resolution processes

J) Business Intelligence and Reporting
- How will you be able to retrieve, analyze and even predict with the data in your system?

K) Document Management & Collaboration
- Extending the value of the system to share data and collaborate on opportunities, incidents and document creation

L) Setup and Customization
- To what extent will you wish to tailor the system to meet your data, look & feel and process requirements? How will you manage the system once it is yours?

M) Support and Help
- Determine the support levels and assistance will you want or need once you deploy your new CRM solution

Solution Depth & Deployment Options	Notes	Priority
Does the product have integrated Sales, Service and Marketing automation modules?	Seamless integration of all capabilities from a single vendor reduces risk and increases user familiarity and adoption.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Can each component i.e. the sales, service and marketing modules be deployed separately to each user that needs them, so users don't pay for what they won't use?	This is important to lower the total cost of ownership and to reduce training needs, so people only see and use what they need.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Does the product have a "lite" version that is less expensive and can be used by managers or administrators who don't need all the features of the core products?	This is very important to lower the total cost of ownership and increase user adoption by having a version that meets the needs of each type of user.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Does the product include self service portals for customers and partners?	This is the ability for customers and partners to log into a private extranet that serves up content and data specific to the relationship. This is a crucial feature for delivering self help and reducing support costs.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Can the product be deployed as an on-premise application (like traditional CRM tools)?	This is an import choice in the event corporate policy towards hosting or other corporate considerations dictate a need to bring business applications in house.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Does the product have desktop organizer integration?	This should be configurable and bi-directional.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Does the product have an off-line client for disconnected use?	Ability to update downloaded sales information and synchronize this with the CRM application when back online.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Does the product have a customizable mobile client that runs on all the following devices: cell phones | PDAs | Smart Phones?	This should be customizable and include custom fields from the main desktop CRM application.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to update sales opportunity information from a phone using voice recognition.	This is a powerful usability feature that saves sales people a tremendous amount of time. When they are on their phone they can call into the application and use their voice to update their sales records.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

User Interface	Notes	Priority
Ability to edit records as soon as they are opened using what is called "in-line" editing. There should be no need for the user to click an "Edit" button and be taken to a different screen with potentially different information being displayed on this screen. User should be able to edit all information, add tasks, and complete other functions like reassignments in one pass from one screen.	This is an important time saver for users; as soon as they have found a record they can start updating immediately. Many CRM applications require the user to click the "Edit" button which then takes them off the screen they are looking at (requiring another page load) before they can update it. Quite often the Edit screen is different from the original screen they were viewing, and typically it doesn't contain the same information.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to build lists of records on the fly and then page through the records one at a time for review and updating.	This saves users a tremendous amount of time. The traditional user interface requires the user to search, open, edit, save, close, search, open, edit, save, close. This approach means the user to can search and the just hit "next", "next" to page through their records.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Dashboard type presentation of all New and Updated CRM data like new contacts, companies, leads, opportunities and customer service incidents. Items should be organized to show new items based on different periods. User should be able to click on the number of items to drill down and start working on the new or updated items.	There is no more convenient way to access the latest CRM data than via a drill down dashboard. This is different to a list of 'recent' items which lists just the things the user has opened or modified. A "What's New" dashboard is a real-time update of the latest information with single click access.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
The user interface should provide a visual record of what screens the user clicked on before arriving at their current screen. This feature is often called "breadcrumbs".	This is a must user interface feature that provides users the easiest possible way to navigate around an application and jump from screen to screen without loosing track of where they are or where they have been.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
One click access to common tasks from an easily accessible and context sensitive menu throughout the application.	This is an ease of use feature that reduces training times, helps users to remember where to be to get things done and increases their productivity.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to Print, Email and Export to Excel commonly accessed screens like sales check-lists, opportunity analysis, activity lists etc.	Convenient distribution and export of information makes it easier for users to interact with each other and to work offline when convenient.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Contextual navigation menus that predict the actions an employee is likely to take next.	Increase user adoption by reducing the amount of clicks and screens the user is required to transverse, ultimately saving minutes a day, hours a week, weeks a year.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Global search feature, including worknotes, that returns high-quality results by category (Company, Contact, and so on) and the ability to conduct subsequent “search within a searches.” The ability to take specific action with results immediately from the screen, rather a mandatory extra step.	Powerful search with “action” capability makes it easy to find what the sales or service rep is looking for and to finish the activity in fewer steps. Searching worknotes is important because they contain critical information that is otherwise difficult to access unless you know specifically where it is located.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

An interactive version of the CRM Checklist is available through your Entellium representative.

Activity Management	Notes	Priority
Ability to view all Activities for a Company from a single screen, including activities with Contacts at the same Company.	This means users can open a Company record and see everything happening with that Company from one screen, including what is happening with Contacts at the same Company.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to pre-define a series of activities like tasks, appointments and calls that should be executed in a pre-defined sequence and applied to any entity like a Lead or a Contact.	This way users don't have to manually enter tasks each time if you have a typically repetitive method of following-up with customers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to not only set and track revenues by sales representative and product, but daily, weekly, and monthly quotas around cold calls, number of appointments scheduled and lead conversion targets.	Tracking the actual activities that lead to closed sales such as cold calls, appointments, recurring appointments, and lead conversion gives sales managers specific actionable data on where their activity trouble-spots are before the end of the revenue period.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to merge customer data with company document templates for custom proposals, letters, product quotes, and contracts, and have the application automatically send the document and attach a copy to the contact's master record.	Sales reps save time in creating custom-looking documents, and all of the documents sent out are stored with the contact in the CRM system and not on someone's hard drive. There won't every be a question on what document a contact actually received.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Activities appear near or on a Calendar enabling in-line editing and quick updates.	This improves user productivity and reduces clicks and screen changes.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Completed Activities can be easily logged and display in all parts of the application.	This is a key element to providing users convenience by allowing them to update or complete activities from anywhere in the application.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Activity reminders can be filtered showing Overdue, Due Today and Due This Week.	A single screen that shows activities this way improves productivity and reduces clicks and screen changes.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to link activities to Contacts, Companies, Leads, and Opportunities.	Important flexibility to cater for the various ways sales people will use a CRM tool.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to view all work notes for a Company from a single screen.	When lot's of activities have being taking place with a Company over time, it's very important to have a single location to view all work notes and activities.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to add, edit and work with all types of activities from a single screen.	Creating and updating all activities from one screen is a tremendous time saver for users.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability for system to automatically send emails to Contacts at a pre-determined date and time for automatic follow-up.	An essential feature so that users don't have to remember to send emails in follow-up to sales inquiries or as part of the sales process.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

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All emails sent to Contacts should appear in the activities details for that Contact.	Tracking email correspondence sent to prospects and contacts is an important capability for tracking account progress.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to merge customer data with company document templates for custom proposals, letters, product quotes, and contracts, and have the application automatically send the document and attach a copy to the contact's master record.	Sales reps save time in creating custom-looking documents, and all of the documents sent out are stored with the contact in the CRM system and not on someone's hard drive. There won't every be a question on what document a contact actually received.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Marketing Capabilities	Notes	Priority
Ability to segment customer data and build multiple lists at a contact, company, lead and opportunity level.	Being able to conduct searches and save the results into a "list" which can then be named for future reference is an important tool for marketers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to conduct mass email campaigns including rich HTML emails that include attachments.	Sending personalized emails using HTML templates is a convenient and easy way to build a relationship with contacts. Being able to include attachments and choose email signatures further extends the purpose and usefulness of the feature.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to establish marketing activity plans or campaigns whereby a sequence of tasks has to be completed in a certain order within a certain time frame. For example, send email, follow-up with call 2 days later, send reminder email and schedule outbound call 5 days later.	This is a must have feature for any marketing department or inside sales team. Executing campaigns in lock-step order is proven to yield higher conversion results.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to track leads and lead conversion throughout the pipeline.	This gives marketing managers insight into the results produced by marketing down to what stage in the sales process leads have progressed to.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to track new pipeline added and new revenue closed from leads.	Being able to analyze the results of marketing campaigns both from the perspective of added pipeline as well as actual business won is critical to understanding the effectiveness of marketing spend.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Customer & Contact Management	Notes	Priority
Full 360 degree view of the customer record including the ability to see and edit the following: contacts | leads | sales history | customer service incidents | current opportunities and ALL activities across the company including contacts at the company.	This is a must have in any CRM to provide users the holistic view of everything happening at a company.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to create Contracts from closed opportunities, including ability to: attach documents | set reminder dates | set follow-up task | establish service level standards associated with the contract.	Closing the loop and taking won business to the next stage in your process requires strong contract management capabilities so that other parts of the organization know what has been committed and/or agreed to.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to auto-update Contact details by sending individual or bulk emails to lists of contacts prompting them to either confirm, edit, or delete their contact information. Emails should have the ability to include attachments for communicating company news or updates to the contacts to encourage them to update their information.	There are a number of reasons why this feature is important and should be integrated directly into the CRM platform. Two key benefits include saving time and money on keeping your contact database up to date and secondly by tracking who responds and how they respond helps sales reps get a perspective of their relationship with that contact.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability for contacts to automatically update their "Do Not Call" and "Do Not Email" preferences.	Doing this manually one record at a time can be a time consuming and expensive exercise. Not having this information and not adhering to these personal information preferences is against the law in certain countries and states.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Support for company hierarchies, including the ability to link contacts, companies and associated activities.	Establishing a company hierarchy helps understand the roles, responsibilities and influence of respective individuals within an opportunity, or at a corporation with multiple subsidiaries that may become multiple opportunities.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Lead Management	Notes	Priority
Workflow powered distribution of Leads with the ability to complete "round-robin" and "ratio" based allocation of Leads into queues. Round robin distribution allocates leads to queues evenly, ratio based distribution enables sales managers to determine what percentage of Leads go to what queue or sales representative.	This completely removes the need for sales managers to manually allocate leads and shouldn't be confused with distributing leads based on other rules, for example, which state the lead is from?, or what the product of interest is. This method automatically counts and keeps track of who gets what lead thus providing true workforce management for sales managers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

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Ability to set thresholds for sales people and queues to make sure that sales people don't have too many or too few leads to work on.	This compliments the round robin and ration distribution by automatically managing sales people workloads. No sales person will have too many leads or too few leads with this feature.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
The ability to for users to build "Lists" of their Leads for completing call downs or email campaigns. These Lists should be exportable to Excel, CSV and XML for easy integration with external applications.	List building is often a feature reserved for just the marketing part of products. Giving all users the ability to build Lists helps them to organize and prioritize how they follow-up and target new and existing Leads.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Leads should be segmented from the main CRM database until they have been qualified and confirmed as a real Opportunity. Once a Lead has been qualified, it should be "promoted" and automatically create company, contact and opportunity information from the single lead record.	This is very important for data management. Leads are "transient" data and should therefore not be co-mingled with valid customer or prospect records.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Lead screen should provide users the ability to update profile information, lead ratings, set tasks and complete an assignment from a single screen in a single pass.	A lead is typically managed by an inside sales team or other heads down users. They should be able to update all lead information, including allocating tasks and assignment to sales people from a single screen to minimize screen changes and page loads.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should support the ability to have new leads from existing companies and these new leads should be linked to existing companies.	Many CRM applications don't seamlessly link new leads to existing company records and as a result reps following up on the leads won't know that this is a lead from an existing company they have done business with. This can result in confusion.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Leads can be imported in bulk and distributed simultaneously using workflow rules.	This is the most efficient way to manage bulk import of new leads. The application will read the new import file and distribute leads directly into queues keeping track of existing workloads and thresholds.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Sales Process & Opportunity Management	Notes	Priority
Ability to set-up multiple sales processes to track each Opportunity type with a different sales process.	Being able to specify workflows, tasks, stages in the sale, and forecasting rules based on the opportunity type improves sales execution tremendously.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to view all deals in a pipeline no matter what sales process they are part of in addition to the ability to view only deals specific to a certain sales process.	Important flexibility for management to get a holistic view of data, as well as the ability to drill down and see pipelines specific to a sales process.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Ability to track Win Probability, Likelihood of Award and Weighted Probabilities	The combination of tracking Win Probability and Likelihood of Award separately to produce a Weighted Probability produces the highest pipeline and forecast accuracy.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to conduct detailed Opportunity Analysis to ensure sales reps have qualified Opportunities fully and to be able to print or email this analysis for account reviews.	Critical to the success of CRM is improving the qualification of opportunities and to ensure sales reps are asking all the right questions at the right time. This capability is a must have to achieve this goal.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to build custom checklists to track progress within a sales stage and between sales stages. This checklist should be printable and email able.	Checklists are a tool to guide selling. They should be flexible but not required steps because this tends to frustrate sales reps.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability for sales reps, in one pass, to update opportunity information and set tasks from a single screen.	Sales reps will be updating information all the time so reducing screen jumps and clicks saves time and increases user adoption.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to complete team selling where Opportunities can be shared amongst sales reps, including automatic sharing with superiors.	Flexibility in how sales operates on an opportunity-by-opportunity level is a must have and this feature allows managers to determine either at a system level or at an opportunity level how opportunities can be shared.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Application provides product database, include support for product hierarchy and the ability to determine one time or recurring revenue types for each product.	Product databases provide integrity in pricing and SKU integration with accounting or inventory applications. Price books also drive how product revenue is recognized.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to build quotes in the application including selecting from a product database, setting discounts and scheduling revenue recognition based on date.	This is a time saving feature for sales reps and the revenue recognition settings at a product level or critical to accurate reporting.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System generated opportunity audit that captures and highlights all changes to the status of an opportunity.	Providing managers a summary view of what has happened with an opportunity including tracking the changes provides managers a bird's eye view for account reviews.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
A sales knowledgebase with easy access to a searchable database for any type of information required while working with a prospect - objection handling, competitive selling points, product information, sales scripts, benefit statements, etc.	This is a powerful selling aid that institutionalizes sales knowledge across the department.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
In-depth analysis of sales opportunities, including a summary of interactions and completed tasks and how long it's taken the prospect to move through each stage of the sales process – in one place.	Greater intelligence in a simplified format for managers to review to provide actionable insight, increasing the likelihood of closing the sale.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Tracking Revenue & Forecasting	Notes	Priority
Application should support multiple revenue types including one time and recurring and opportunities should be able to include one time and recurring revenue types in the same opportunity.	This is a must feature for accurate forecasting and pipeline management. A CRM tool should reflect the business model of the company.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Sales reps should be able to schedule revenue recognition based on setting a date.	There are often times when revenue should not be recognized or invoiced until a product has been delivered or a service has been completed. This feature enables sales reps to determine how revenue will be recognized in the application.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Reports and dashboard should differentiate between new revenue and existing contracted revenues in any given period.	There is a difference between new business and existing contracted business; this needs to be easily identifiable in the application.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Sales reps should only be able to forecast deals that meet a certain business rule and reps should be able to determine individual inclusion of opportunities into a forecast.	This approach of allowing sales managers to determine what criteria opportunities have to be meet to be a forecast candidate, and then providing sales reps with the ability to decide what opportunities are included increases sales rep accountability and forecast accuracy.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Forecast roll-ups should be possible to sales managers can build forecasts based on reporting structures.	Forecast roll-ups make it easy for sales managers to run forecasts across different sales team and/or report on forecasts from different teams.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should be able to track changes to forecast and provide a forecast history record.	Comparing original forecast with revisions and being able to explain what has changed is an important part of management reporting so the application needs to provide forecast history tracking.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Customer Care	Notes	Priority
Ability to capture, track and manage customer incidents via a queue centric workflow based customer support process.	Institutionalizing how customers are responded to increases accountability and customer satisfaction levels. A queue centric approach I.e. routing incidents to queues provides better management and control, as well as scalability in the process.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Workflow engine must support rules based and ad-hoc based routing to queues.	Sometimes business rules don't quite fit the situation so it is important that items in queues can be routed (based on permissions) outside of the core business rules.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

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The ability to clone customer incidents and establish "parent" / "child" relationship between related incidents.	Very often customer incidents are made up of several issues. You don't want to tell a customer you have resolved something when there are two other related issues unresolved. Being able to establish "parent" / "child" incidents overcomes this issue and makes sure that an incident is only 'closed' when both the "parent" and "child" issues have been resolved.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
The ability to define support processes and target resolution or turnaround times specific to individual customers within the same application and without customized coding.	Differentiating customer service levels based on the type of customer or agreement is crucial to optimizing your resources and building your competitive advantages by differentiating your support offering to premium customers or suppliers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Support for multi-level alerts and notifications when a customer incidents is exceeding a target turnaround time.	This provides an escalation process for proactively dealing with customer service issues that are not tracking to plan.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to establish personalized customer support portals or pages for individual customers.	This is a powerful ability to provide your largest customers self help portals where they can log incidents, track progress with existing incidents and all in a private, branded and personalized way.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Integrated email response management so that emails are automatically turned into service incidents and routed into the correct workflow queue.	Email is one of the most popular ways of submitting service issues so you will need a way to deal with them that is scalable, automated and accountable. Email response management integrates email tightly into your core customer support process and reduces manual data entry for support reps.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Configurable "Live Chat" so that internal support people can chat live with customers via a web page or site.	Resolving customer issues as they happen in real-time is the ultimate customer experience. It increases customer satisfaction levels and reduces costs associated with supporting customers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Built in searchable Knowledgebase that includes permissions based publishing or answering of questions received via the Knowledgebase.	Knowledge transfer and organized accessibility to knowledge is a critical component to helping customers and ensuring a consistent level of customer experience. A knowledgebase institutionalizes knowledge and increases the effectiveness of support reps when dealing with customers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
A simple-to-use knowledge base that allows reps to search, submit questions, post articles and expose the knowledge base across the service organization.	Institutionalize department intelligence for faster resolution of common incidents.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Business Intelligence & Reporting	Notes	Priority
System should provide graphical reports and dashboard, for example dials, gauges and sliders.	Visual reports are more memorable and help users to determine what information is being presented to them to analyze the issues and make recommendations.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should provide the ability to build "what if" scenarios and save those scenarios for future reference.	CRM applications typically report on historical data and don't allow users to model how sales would look in the future if certain things changed. For example and increase in average revenue per customer in Q2 would lead to higher revenues in Q3. Modeling and completing what if scenarios are a critical part of sales management and planning.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should provide the ability to export reports as interactive objects, including the report data so that they can be used in presentation tools and documents and still maintain their formatting and animation capabilities.	Reports are often used in off line environments in sales meetings or management reviews. Currently CRM tools don't allow reports to be run within tools like PowerPoint. This is a powerful capability to allow sales managers to run sales scenarios and look at a pipeline analysis off line as part of their presentations.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should provide drill down dashboard so that users can discover what makes up the data or report being reviewed.	Reviewing numbers and then discovering what makes up those numbers by clicking and drilling down to see the details brings more context and meaning to the numbers.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should provide historical reports that show trends and allow comparisons between time periods.	Reports should show 13 month periods so that users can make a visual comparison to prior periods.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Users should be able to use report filters and/or a report generator to build their own customer reports and export these reports into Excel.	Reporting is rarely standard across different users and departments so this level of flexibility is important to cater for via system generated reports, user defined reports, and more custom reports built in Excel.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
System should provide the ability for users to run live reports directly from with Excel, without the need to export data from the CRM application first.	This extends further the flexibility of reporting by providing the ultimate benefit of using powerful features like Pivot Tables in Excel.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Automatically generate and publish reports at regular intervals to management, with no manual intervention.	Reduces the last-minute stress of running the same reports in advance of regular meetings and ensures that a snapshot of data is taken at the appropriate time.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

An interactive version of the CRM Checklist is available through your Entellium representative.

Document Management & Collaboration	Notes	Priority
The application should provide the ability to store documents in a central location or attached to specific records and include version control including check-in, check-out and notifications.	Sales reps work with documents constantly. Introducing a central storage location ensure everyone is working from the latest set of documents and makes sure that documents that are part of a proposal to a client are kept with the main sales record.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to set-up collaborative teams (with access and permission rights) that includes team discussion forums.	Sales reps often work together or with other people. The ability to build ad-hoc teams and topic specific discussion threads aids communication and collaboration.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Setup and Customization	Notes	Priority
Ability to define roles, access and permissions of users, including departmental hierarchy.	This is an essential feature for managing access to records in the application. Being able to assign records to specific access roles and permissions increases the flexibility of the application to cater for a multitude of scenarios.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to segment CRM data into different access and permission groups to restrict access to customer records.	The ability to associate a customer record with specific access code makes it possible to restrict access to specific customer records to specific users or user roles.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to add custom fields to all tabs and to have the ability to import into and report on custom fields.	Adding custom fields will improve the overall fit and applicability of the application for users. For a more complete solution users should be able to import data into custom fields as well as include the custom fields in reports.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability to map system and custom fields between contact, company, lead and opportunity records.	This is an important feature as it provides administrators control of how information captured at various touch points with a customer flows as the customer moves through a sales process.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability for the administrator and for individual users to customize the user interface color schemes.	This feature adds to the customer experience by providing each user the chance to change the colors of the screen to suit their preference.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Ability for system administrators to change all field and tab labels to reflect business practices and internal terminology.	This feature helps to increase familiarity and therefore understanding of the application, which aids user adoption and usefulness to the users.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Ability for system administrators to build and deploy multiple web forms for lead capture and include hidden fields for tracking how visitors arrive at web pages and forms.	Capturing data from leads or other external parties is a critical component of how a CRM platform can introduce efficiencies in the selling process. Being able to 'tag' certain forms to understand the ultimate source of the inquiry is critical information to marketing departments to help guide spend.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Documented web services based API for completing custom integration with other applications.	Specifically a Web Services based API reduces the cost and complexity of integration projects.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Support for multiple languages.	This may not be an immediate requirement for all companies, but the moment it does you need to make sure you haven't closed the door on international use of your core CRM tool.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Support for multiple currencies, including dual currencies within the application for quoting in different currencies and or reporting in different currencies.	As with language multiple currency support is important and could be required when quoting to customers in foreign countries. Make sure your CRM product supports dual currencies so that your opportunities can be quoted in one currency but your internal reporting consolidated in your default currency.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Support and Help	Notes	Priority
Application should include built-in contextual help.	A generic help file is useful but tedious for users when they are looking for specific help based on the page of the application they are working on.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Application should include best practice tips on specific tabs and pages to help maximize user productivity.	Very often the opportunity to maximize the full benefit of CRM is limited by not completely understanding how to make the best use of the application. A CRM platform should have best practice links or information built into the product to help with user productivity.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Application should include built-in video based tutorials that users can watch in their own time to learn specific functions of the product.	This allows users to complete on demand training at their convenience and provides an "always available" expert reference when the need is more urgent.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Application should include a built-in Live Chat capability so that users can chat directly to the vendors help desk personnel 24/7.	Live Chat puts users one click away from product experts and reduces the amount of calls or incidents that are raised internally to help desks or system administrators.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Application should include a searchable Knowledgebase for quick access by users.	The Knowledgebase should be accessible from within the product so that it is easier for users to get to when they need it.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Vendor should offer free 24/7 customer support accessible via Live Chat, email, or telephone.	A successful CRM project includes being able to resolve user's issues immediately any time of the day.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Vendor should provide free on demand training	It's not always possible to get all users together at the same time and there are often changes in staffing. On Demand training is a convenient solution to ensure everyone is fully trained.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Vendor should offer a free "go-live" plan to guide the most effective and rapid deployment of the CRM application.	A guided implementation that shows customers the most effective way to go live, using a step-by-step guide is a must to maximize the success and deployment of a CRM project.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?
Instant message with CRM product experts from the application, for all system users.	Real-time support resolution for all employees increases adoption because they get answers within the application right when they need it - thereby helping them resume daily activities with a minimum of interruption.	☐ Must Have? ☐ Nice to Have? ☐ Not Important?

Somos uma empresa do sector das tecnologias de informação, com quase 20 anos de experiência no mercado nacional. Temos sede em Lisboa e um escritório no Porto. O nosso negócio assenta em duas vertentes:

** Implementação de "Customer Interaction Solutions", através dos serviços de uma equipa técnica especializada e com uma vasta experiência no sector;*

** Representação e distribuição de produtos líderes mundiais com provas dadas no mercado, quer pelos prémios atribuídos pela imprensa especializada internacional, quer pelo volume de instalações já realizadas.*

Além de soluções líderes de mercado, a Netopolis detém o know-how e experiência comprovada em projectos desenvolvidos nas áreas de:

* CRM (Vendas e Marketing)

* CRM (Serviço e Suporte)

* "Service & Help Desk"

* Portais Self-Service multi-canal

* Contact centers

* Servidores de Fax, SMS e Voz

Contamos já com uma carteira de milhares de clientes, instalações e referências em Portugal.

Faça parte do nosso grupo!

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