Key features of a CRM - Checklist

Read more at: https://www.onepagecrm.com/blog/choosing-best-crm

CRM	OnePageCRM	CRM 2	CRM 3
Admin			
1. Pricing	$12 per user/per month		
Free setup and (3) user onboarding	✔		
Free trial evaluation?	21 days		
2. Hosted (Cloud based Saas)	✔		
4. Great customer support	✔		
Live webinars	✔		
Phone support	✔		
Email support	✔		
Live chat	✔		
Knowledge base / Help site	✔		
5. Mobile access			
Web	✔		
Tablet	✔		
Mobile	✔		
Relationship Management			
6. Contacts	✔		
Companies / Accounts	✔		
7. Duplication and merging	✔		
8. Sales leads	✔		
9. Opportunities / Deals	✔		
10. Activities	✔		
11. Tagging / grouping / segments	✔		
12. Custom fields (Contacts, Accounts & Deals)	✔		
13. Document attachments	✔		
14. Task management	✔		
Next action guidance	✔		
15. Notifications	✔		
Data entry			
16. Automatic data capture	✔		
17. Bulk import	✔		
18. Integrated lead capture from 3rd party apps	✔		
19. Contacts import (Gmail / Outlook)	✔		
Business Integrations			
19. Gmail	✔		
19. Outlook	✔		
20. Email sending	✔		
21. Email marketing	✔		
22. Accounts	✔		
23. Marketing	✔		
24. Customer support	✔		
25. Zapier	✔		
26. Webhooks / API	✔		
27. Social media	✔		
28. Data portability			
Import of contacts / leads	✔		
Export of contacts / leads	✔		
Reporting			
29. Pipeline	✔		
30. Forcasting	✔		
31. Team Activities	✔		
Security			
32. Application security	✔		
33. User roles	✔		
34. Regular data backups	✔		
35. Server uptime	✔		
36. User reviews			
User adoption			
37. Ease of use	✔		
38. Low data entry	✔		
Your business objectives			
List the business objectives you need the CRM to help you achieve. Will this CRM help?			
1			
2			
3			