# Key features of a CRM - Checklist

Read more at: [https://onepagecrm.com/blog/choosing-best-crm](https://onepagecrm.com/blog/choosing-best-crm)

<table>
<thead>
<tr>
<th>CRM Admin</th>
<th>OnePageCRM</th>
<th>CRM 2</th>
<th>CRM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pricing</td>
<td>$12 per user per month</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Free setup and (3) user onboarding</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Free test evaluation?</td>
<td>✓</td>
<td>21 days</td>
</tr>
<tr>
<td>2. Hosted (Cloud based SaaS)</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Great customer support</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Live webinars</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone support</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email support</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Live chat</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Knowledge base / Help site</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

## 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. Forecasting ✓
- 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. [ ]