≠ **Simple Strat**

CRM Requirements Worksheet

Use this worksheet to review the types of features and details you need in a CRM. Bring this info with you to any demo calls and ensure the company you've hired to help with the CRM setup and/or migration is aware of these needs.

Use the priority and mandatory columns to indicate how important this is to the success of your organization and sales/marketing efforts. Use the additional notes field for comments that would specify what you want that feature to do, or the outcome you hope to achieve by using it.

CRM Feature	Priority 1- Essential 2- Important 3- Optional	Mandatory (Y/N)	Additional Notes
Opportunity/Sales			
Contact Management			
Account Management			
Sales Forecasting			
Activity Tracking/Management			
Deals/ Sales Tracking			
Quotes/ Proposals/ Order Management			
Contract Management			
Project Management			
Round Robin/ Lead Assignment			
Reporting			
Marketing			
Campaign Planning			
Campaign Execution/Management			
Lead/List Management			
Brand Management			
Forms			
Lead Scoring			
Marketing automation			
Email automation			
Social Media			

CRM Feature	Priority 1- Essential 2- Important 3- Optional	Mandatory (Y/N)	Additional Notes
Service			
Tickets/ Service Requests			
Ticket Assignment			
Call Center Automation			
Customer Feedback/ Surveys			
Knowledge Base			
Self Service/ Customer Portal			
General			
Security			
File storage			
Email integration			
Calendar integration			
Appointments/Bookings			
API/ Integration options			
Tasks			
Mobile App			
Phone/Calling Integration			
Role based Access/Permissions			
Custom Fields			
Miscellaneous Notes			