



Want the short-and-sweet version of our CRM Buyer's Guide? Take this checklist on the go to help you choose, vet, and evaluate your top CRM options.

14-step process to choose the right CRM

- 1 Understand the basic, standard functions and use cases of a CRM
- 2 Learn the features that different industries and sales teams would need in a CRM
- 3 Decide whether you want an end-to-end tool or a personalized sales stack
- 4 Define key priorities as a manager and with your team
- 5 Create a list of must-have features and nice-to-have features
- 6 Identify key integrations your team needs
- 7 Demo several different tools to compare effectively
- 8 Learn more about support, onboarding, and data migration options
- 9 Evaluate for user-friendliness
- 10 Find reviews and customer stories that are relevant to your unique use case
- 11 Determine price transparency and final cost including the features you need

- 12 Check off required security and compliance features for your business
- 13 Make a purchase decision you feel confident about
- 14 Continue to monitor the success of your purchase with metrics like ROI, quota achievement, sales cycle length, outreach volume, and adoption rate

12 questions to ask your CRM vendor before purchasing

- 1 How much training is needed for my team members to use your CRM?
- 2 What kind of onboarding do you offer?
- 3 How will implementation work?
- 4 What resources do you offer to help me learn this system and implement it?
- 5 How do I migrate my existing data?
- 6 Does your team help with data migration? If so, is this a free service or paid?
- 7 What native integrations do you offer? What do they include?
- 8 Do you have a Zapier integration built?
- 9 Do you see any red flags that we would not be a fit for your CRM?
- 10 Do you have other customers in my industry?
- 11 How secure is the data in your system?
- 12 Do you have a dedicated success team that I can talk to once I'm a customer?



Looking for a CRM that helps you drive more revenue and close more deals?

Here are just some of the reasons why sales-teams love Close CRM...

“ *If Salesforce is ‘Microsoft,’ then Close is ‘Apple.’ As a sales leader, the reporting in Close gives me everything I need.*

Michael Occhipinti

Vice President of Sales, NatureBox

“ *I love how flexible Close is. Being able to automate our workflows with such precision from Customer.io into Close gives me incredible confidence in our sales flow. And the new custom activities are really sweet!*

Alex Patton

Director of Marketing & Analytics, Customer.io

“ *Since we've started using Close, we've **QUADRUPLED** our average revenue per user.*

Sara Archer

Director of Sales & Marketing, ChartMogul

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(No credit card required)