

# Customer Relationship Management (CRM) Software



## NEEDS ASSESSMENT



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# CRM Needs Assessment Checklist

## List Key Sales/Customer Issues/Problems/Reasons for CRM:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## Key Features you want/need from CRM:

- |   |  |
|---|--|
| <input type="checkbox"/> Lead Management                          | <input type="checkbox"/> Customer Database                 |
| <input type="checkbox"/> Account Management                       | <input type="checkbox"/> Contact Management                |
| <input type="checkbox"/> Analytics/Business Intelligence          | <input type="checkbox"/> Activity Management               |
| <input type="checkbox"/> Sales Opportunities                      | <input type="checkbox"/> Sales Tracking                    |
| <input type="checkbox"/> Sales Forecasting                        | <input type="checkbox"/> Sales Analytics                   |
| <input type="checkbox"/> Tasks, Calls and Calendar                | <input type="checkbox"/> Scalability                       |
| <input type="checkbox"/> Reports and Dashboards                   | <input type="checkbox"/> Email Templates                   |
| <input type="checkbox"/> Mobile App (iOS/Android)                 | <input type="checkbox"/> Data Import                       |
| <input type="checkbox"/> Export Events to Google/Outlook Calendar | <input type="checkbox"/> Export to Google/Outlook Tasks    |
| <input type="checkbox"/> Security (User Levels)                   | <input type="checkbox"/> Sales Force Automation            |
| <input type="checkbox"/> Email Integration (Outlook/Gmail)        | <input type="checkbox"/> Supply Management                 |
| <input type="checkbox"/> Call Center Automation                   | <input type="checkbox"/> 3 <sup>rd</sup> Party Integration |
| <input type="checkbox"/> Case Management                          | <input type="checkbox"/> Test Delay Notification           |
| <input type="checkbox"/> Inventory Management                     | <input type="checkbox"/> Quality Events Management         |

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- |   |   |
|---|---|
| <input type="checkbox"/> Specimen Tracking      | <input type="checkbox"/> Courier Dispatching    |
| <input type="checkbox"/> Utilization Management | <input type="checkbox"/> Physician Report Cards |
| <input type="checkbox"/> Outreach Management    | <input type="checkbox"/> Blood Management       |
| <input type="checkbox"/> Population Management  | <input type="checkbox"/> Fleet Management       |
| <input type="checkbox"/> _____                  | <input type="checkbox"/> _____                  |
| <input type="checkbox"/> _____                  | <input type="checkbox"/> _____                  |
| <input type="checkbox"/> _____                  | <input type="checkbox"/> _____                  |
| <input type="checkbox"/> _____                  | <input type="checkbox"/> _____                  |
| <input type="checkbox"/> _____                  | <input type="checkbox"/> _____                  |

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## Research CRM Vendor

- #1 \_\_\_\_\_ Have you scheduled a demo?  Yes  No
- #2 \_\_\_\_\_ Have you scheduled a demo?  Yes  No
- #3 \_\_\_\_\_ Have you scheduled a demo?  Yes  No
- #4 \_\_\_\_\_ Have you scheduled a demo?  Yes  No
- #5 \_\_\_\_\_ Have you scheduled a demo?  Yes  No

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## Does CRM Vendor solve your Key Issues/Problems?

**NOTE:**

- |          |  |       |
|----------|--|-------|
| #1 _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| #2 _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| #3 _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| #4 _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| #5 _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |

# CRM Needs Assessment Checklist

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Does CRM have the features you are looking for?

**NOTE:**

- 
- #1 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #2 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #3 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #4 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #5 \_\_\_\_\_  Yes  No \_\_\_\_\_

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Is CRM easy to use?

**NOTE:**

- 
- #1 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #2 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #3 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #4 \_\_\_\_\_  Yes  No \_\_\_\_\_
- #5 \_\_\_\_\_  Yes  No \_\_\_\_\_

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**Additional questions to ask each vendor:**

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What are the CRM Hosting Options? \_\_\_\_\_

Does your system integrate with other systems?  Yes  No, If yes which systems?

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Is your system customizable?  Yes  No

How is training provided? \_\_\_\_\_

How is Support and Maintenance provided? \_\_\_\_\_