

CRM Decision Matrix

Compare finalists with must-have gates, weighted criteria, evidence confidence, commercial cost, and implementation risk — then recommend.

Project:

Owner:

Team:

Date:

Decision deadline:

SHORTLIST

Vendor A

Name:

Vendor B

Name:

Vendor C

Name:

Vendor D

Name:

Status quo

Name:

DECISION SNAPSHOT

LEADING VENDOR

WEIGHTED SCORE

GATES

3-YEAR TCO

CONFIDENCE

STATUS

DECISION FUNNEL

QUALIFY

!

SCORE

!

COMPARE COST

!

ASSESS RISK

!

RECOMMEND

Leave snapshot fields blank until gates, scores, cost, and risk are completed. Never invent figures.

01

Decision framework

Work top-down. A failed must-have gate ends the path for that vendor — do not average it away.

1

Must-have gates

Pass / Fail / Unknown — disqualify on Fail

2

Weighted fit

Score 1–5 × weight; sum to /100

3

Commercial

Licence, implementation, 3-year TCO

4

Implementation & risk

Delivery, adoption, dependency risk

5

Evidence confidence

% confident scores are evidence-backed

6

Recommendation

Choice + trade-offs + open conditions

DECISION RULES

Document your team's rules here. Suggested prompts:

• A failed mandatory gate disqualifies that vendor — no averaging.

• Unknowns on must-haves must be resolved before approval.

• Criteria weights must sum to 100%.

• Scores require evidence (demo, RFP, reference, trial) — not opinion alone.

• Record any weight changes and who approved them.

SoftwareGlimpse CRM Decision Matrix

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02

Must-have gates

Mark each vendor Pass / Fail / Unknown. Failed mandatory requirements cannot be averaged away by a high weighted score.

MUST-HAVE	VENDOR A	VENDOR B	VENDOR C	VENDOR D	STATUS QUO
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U
	P F U	P F U	P F U	P F U	P F U

GATE SUMMARY

VENDORS PASSED ALL

FAILED ANY GATE

UNKNOWN REMAINING

READY TO SCORE

Note: A vendor that fails a mandatory gate is out — do not carry them into weighted scoring as if the gap were optional.

03

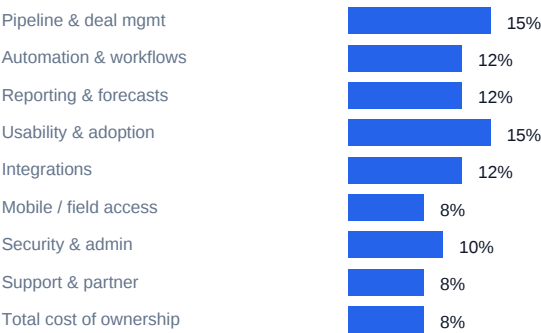
Criteria weights

SAMPLE WEIGHTS — REPLACE WITH YOUR OWN

Teaching defaults sum to 100%. Replace categories, reasons, and weights to match your decision.

CRITERION	WHY (SHORT)	WEIGHT %	OWNER
Pipeline & deal mgmt	Core selling motion	15%	
Automation & workflows	Reduce manual work	12%	
Reporting & forecasts	Management visibility	12%	
Usability & adoption	Usage drives value	15%	
Integrations	Fit with stack	12%	
Mobile / field access	Where work happens	8%	
Security & admin	Governance must-pass	10%	
Support & partner	Implementation risk	8%	
Total cost of ownership	Affordable over 3 yrs	8%	
TOTAL		100%	

WEIGHT DISTRIBUTION (SAMPLE)



Replace every sample weight before scoring. Weights must always total 100%. Document who owns each criterion.

04

Vendor scoring matrix

Enter score 1–5 per vendor (or N/E if not evaluated). Leave blank until evidence exists. Excel computes weighted totals.

CRITERION	WT %	A (1–5)	B (1–5)	C (1–5)	D (1–5)	NOTES
Pipeline & deal management						
Automation & workflows						
Reporting & forecasting						
Usability & adoption						
Integrations / API						
Mobile / field access						
Security & administration						
Support & partner ecosystem						
Implementation complexity						
Data migration readiness						
Total cost fit						
Strategic roadmap fit						

RAW WEIGHTED SCORE (fill after calculation)

A: B: C: D:

Legend

1 = Poor fit · 2 = Weak · 3 = Adequate · 4 = Strong · 5 = Excellent | N/E = Not evaluated (exclude from weighted average until resolved)

05

Category comparison

Blank score bars only — calculate category views from your matrix inputs. Do not invent category winners.

Pipeline

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

Automation

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

Reporting

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

Usability

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

Integrations

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

Value

Vendor A		/ 5
Vendor B		/ 5
Vendor C		/ 5
Vendor D		/ 5

BEST BY CATEGORY

Pipeline:		Automation:	
Reporting:		Usability:	
Integrations:		Value:	

Note: Category "best" lines must come from scored matrix inputs only — never pre-fill vendor names or scores.

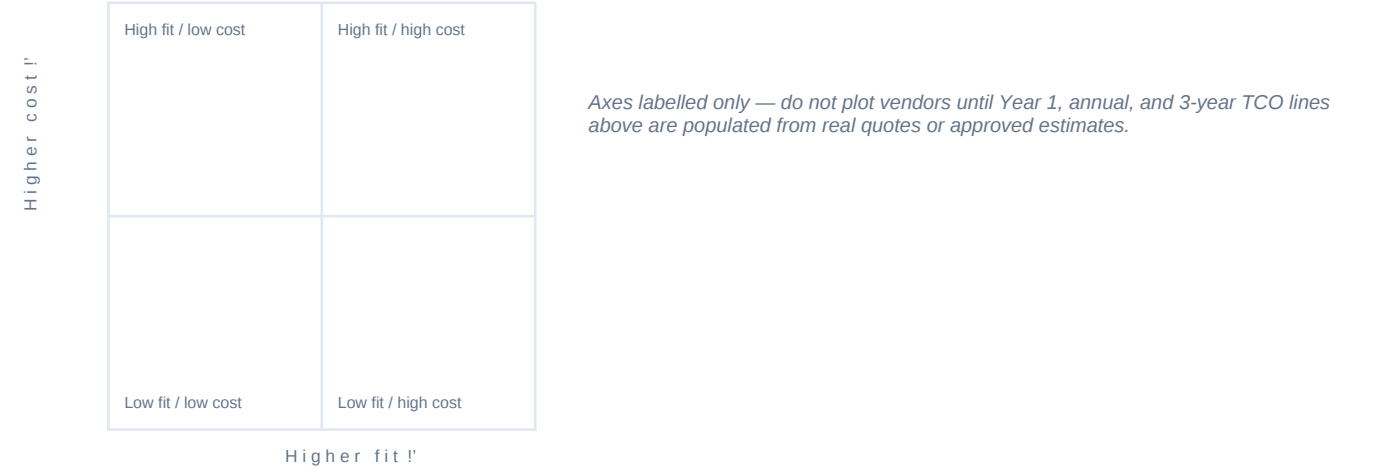
06

Cost & commercial

Enter known costs only. Leave cells blank until quotes or internal estimates exist.

COST LINE	VENDOR A	VENDOR B	VENDOR C	VENDOR D
Enter Year 1 / Annual / 3-year TCO in each vendor column				
Licence / subscription				
Add-ons / modules				
Implementation				
Migration				
Integration				
Training				
Internal effort				
Other				
YEAR 1 TOTAL				
ANNUAL RUN-RATE				
3-YEAR TCO				

COST VS FIT (QUADRANT)



07

Risk & confidence

EVIDENCE CONFIDENCE BY VENDOR

Vendor A

Confidence %:

Vendor B

Confidence %:

Vendor C

Confidence %:

Vendor D

Confidence %:

OPEN QUESTIONS

#	QUESTION	VENDOR(S)	OWNER	DUE	STATUS

KEY RISKS

RISK	VENDOR	LIKELIHOOD	IMPACT	MITIGATION

Confidence reflects how evidence-backed your scores are — not a vendor marketing claim. Resolve open questions before final approval.

08

Decision summary

Rank finalists after gates, scores, cost, and risk. The weighted score informs the choice — it is not the decision.

#1

Vendor:

3-year TCO:

Weighted fit:

Key advantage:

Gates:

Key concern:

Confidence:

#2

Vendor:

3-year TCO:

Weighted fit:

Key advantage:

Gates:

Key concern:

Confidence:

#3

Vendor:

3-year TCO:

Weighted fit:

Key advantage:

Gates:

Key concern:

Confidence:

Note: Score is not the decision. Document why #1 beats #2 when scores are close, gates differ, or cost/risk dominates.

09

Recommendation

WE RECOMMEND

State the recommended vendor / option in one clear sentence.

WHY

Gates cleared · strongest evidence-backed fit · acceptable cost · manageable risk — cite your completed sheets only.

TRADE-OFF WE ACCEPT

What you give up by choosing this option.

WHY NOT THE RUNNER-UP

Specific gate, score, cost, or risk reason — not preference.

OPEN CONDITIONS BEFORE COMMIT

Security review · commercial negotiation · reference checks · pilot success criteria...

Prepared by: Date:

Decision owner: Signature:

NEXT STEP

Build the CRM Business Case for the recommended option — investment, benefits, payback, risks, and formal approval ask.