

CRM Demo Checklist

Vendor being evaluated: _____

Evaluator / Team: _____

Date of evaluation: _____

Run the same buyer-led demo script with every vendor.

HOW TO USE THIS CHECKLIST

- 1 Pick the scenarios
- 2 Send the brief
- 3 Assign roles
- 4 Run the agenda
- 5 Score the same day
- 6 Follow up and hand off

Key: ☐ Pass ☐ Partial ☐ Fail ☐ Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT
1. DEMO PREP & AGENDA					
1.1	Buyer-owned agenda sent in advance	Vendor-led agendas drift into feature tours you cannot compare.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Stage names and sample records shared	Vendors can only run your process if they have your names and records.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Identical script booked for every vendor	Sessions that cover different ground cannot be compared afterwards.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Mailbox or calendar access arranged	Email sync can only be proven with a mailbox someone in the room controls.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Scorer named and score sheet ready	Nobody scores accurately while also running the room.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. LIVE CRM TASKS					
2.1	Create account, contact, and deal live	Shows whether the objects and required fields fit your process before anything else is discussed.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Advance a deal through your stages	Stage names and exit checkpoints are where generic demos usually break down.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Set an owner and a dated next step	Unowned deals with no next action are the most common pipeline failure.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Log an activity on the intended record	Daily adoption depends on activity capture landing where people look for it.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Show an email landing on a contact or deal	Email sync is the most common gap between what a slide claims and what the edition does.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.6	Merge a duplicate contact or account	Merge behaviour decides whether your data stays usable after import.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. MANAGER & ADMIN VIEWS					
3.1	Pipeline board filtered by owner and stage	Managers need weekly status without exporting to a spreadsheet.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Stuck or ageing deals surfaced	Coaching depends on finding the deals nobody has touched.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
3.3	One admin change made live	Ongoing admin effort is part of the product, and you only see it by watching someone do it.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Forecast view built from session deals	Forecast screens on slides rarely match what the quoted edition includes.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. ROLES IN THE ROOM						
4.1	A seller runs at least one task	Vendor-driven clicks hide how the product feels for the people who use it daily.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	A manager asks their own questions	Forecast and coaching needs get lost when one person speaks for everybody.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	The future admin attends	Admin burden lands on a named person, and that person should watch the work.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. SAME-DAY SCORING & FOLLOW-UP						
5.1	Every scenario marked before the next session	Memory fades fast, and the loudest voice wins late debriefs.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Evidence attached to each result	A result without proof cannot be defended in the decision meeting.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Unrun scenarios recorded as Not tested	Inventing a Pass to fill a gap destroys comparability across vendors.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Open questions logged with owner and due date	Gaps found in a demo tend to disappear until contract pressure brings them back.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Results transferred to the scorecard	This checklist records what you observed; the scorecard applies weights and compares.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Scoring guidance

Pass = fully meets. Partial = works with limits.
Fail = does not meet. Not tested = no proof yet.

Evidence matters

Only mark a result when proof exists. Otherwise use Not tested — sales slides alone do not count.

One script. Every vendor.

Use the same scenarios and test steps for every product so comparisons stay fair.