

SoftwareGlimpse CRM Evaluation Checklist

Updated: 15 Aug 2026

Vendor being evaluated: _____
 Evaluator / Team: _____
 Date of evaluation: _____

Evaluate every CRM against the same real-world tests.

HOW TO USE THIS CHECKLIST

- 1 Define
- 2 Shortlist
- 3 Run the same checks
- 4 Capture evidence
- 5 Score separately
- 6 Make the decision

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. CORE WORKFLOW FIT					
1.1	Pipeline stage model matches our process	Ensures comparable sales workflow across vendors.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Owner + next-step rules enforceable	Prevents unowned deals and stale pipeline.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Required fields on objects	Data quality and reporting accuracy.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Activity logging (from email/calendar or manual)	Real-world daily adoption depends on easy activity capture.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Mobile access covers day-to-day work	Field usage and adoption outside the desk.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. USER EXPERIENCE & ADOPTION					
2.1	Daily rep workflow is tolerable	Adoption fails when data entry dominates selling time.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Navigation & search find records quickly	Lost records kill trust in the system of record.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Learning curve acceptable for target roles	Training cost and time-to-productivity.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. COMMUNICATION (EMAIL & CALENDAR)					
3.1	Email sync direction meets requirement	Keeps inbox and CRM in alignment.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Calendar / meeting logging works	Meetings appear on records without manual copy-paste.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.3	Non-admin email/calendar test completed	Proves real-world usability for sellers.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
4. AUTOMATION					
4.1	Assignment / ownership automation available	Reduces manual routing errors.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
4.2	Workflow / notification for stuck deals	Keeps pipeline hygiene without constant manager chasing.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
4.3	Lead routing (if high-volume inbound)	Fair, maintainable ownership for inbound volume.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. REPORTING & FORECASTING						
5.1	Pipeline visibility & dashboards	Team can see status and risk at a glance.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Forecast accuracy options available	Supports reliable forecasts at multiple levels.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Custom reports build cleanly	Answers unique business questions without export gymnastics.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6. INTEGRATIONS & EXTENSIBILITY						
6.1	Critical integrations smoke-tested	Broken sync becomes operational debt immediately.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.2	API / webhooks available if required	Custom or middleware needs must be possible.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.3	Marketplace / extensibility for known gaps	Known gaps need a credible path — not logo wallpaper.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
7. SECURITY & ADMINISTRATION (LIGHT GATES)						
7.1	Roles & permissions cover seller vs admin	Least privilege and safe seller workflows.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
7.2	SSO need confirmed (day-one or deferred)	Identity requirements can block rollout.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
7.3	Admin effort estimate discussed	Ongoing ownership cost is part of fit.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8. DATA & PORTABILITY						
8.1	Import path for contacts/deals works	Trial realism and migration risk.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.2	Export of contacts, deals, and activities confirmed	Exit option and audit readiness.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.3	Custom fields & duplicate handling adequate	Data model flexibility without chaos.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
9. COMMERCIAL FIT						
9.1	Required edition covers must-haves	Edition locks are hard gates.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
9.2	Seat / license model understood	Who needs a paid seat vs lighter access.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
9.3	Add-ons and usage limits noted	Hidden costs and caps change true fit.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
10. EVIDENCE & OUTCOME						
10.1	Evidence filed for every Pass/Partial/Fail	Results without proof are not comparable.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
10.2	Same-day result capture completed	Memory fades; bias grows overnight.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
10.3	Follow-ups and transfer to scorecard listed	Open questions must not vanish into Slack.	*		☐ 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.