

SoftwareGlimpse

# CRM Vendor Scorecard

Score shortlisted CRMs against weighted requirements with evidence confidence and must-have gates.

SCORECARD WORKBOOK · Not a Pass/Fail checklist · Updated 15 Aug 2026 · Excel is the scoring engine

Project:

Evaluator / Team:

Date:

Version:

Weight freeze date:

Freeze weights before the first scoring session. Record any later changes and who approved them.

AT A GLANCE (LEAVE BLANK UNTIL EXCEL IS FILLED)

VENDORS EVALUATED

CRITERIA COUNT

MUST-HAVE COUNT

TOTAL WEIGHT %

RANKING SNAPSHOT (BLANK — FILL AFTER SCORING)

Vendor A

Name:

Score: / 100

Rank:

Vendor B

Name:

Score: / 100

Rank:

Vendor C

Name:

Score: / 100

Rank:

Vendor D

Name:

Score: / 100

Rank:

CONFIDENCE LEGEND

HIGH  
Demo / trial / reference evidence

MEDIUM  
Partial evidence or single source

LOW  
Opinion or thin notes only

UNKNOWN  
Not yet evaluated

SCORING PROCESS

Import criteria

Freeze weights

Score 1–5

Apply gates

Totals

Decide

Archive

Pair with the interactive tool at [softwareglimpse.com/tools/crm-vendor-scorecard/](https://softwareglimpse.com/tools/crm-vendor-scorecard/) — Excel remains the scoring engine; this PDF is the printable workbook. Do not invent vendor winners or research rankings.

01

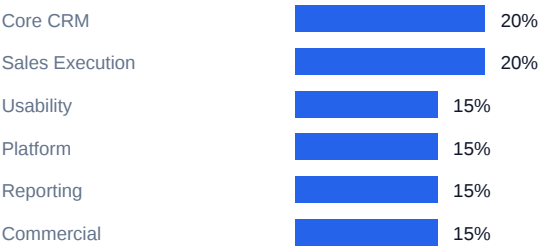
Criteria & weight model

SAMPLE CATEGORY WEIGHTS — REPLACE WITH YOUR OWN

Teaching defaults sum to 100%. Replace categories and weights from your requirements — do not invent mid-demo.

| CATEGORY                | PURPOSE (SHORT)                  | WEIGHT % | OWNER |
|-------------------------|----------------------------------|----------|-------|
| Core CRM                | Contacts, accounts, activities   | 20%      |       |
| Sales Execution         | Pipeline, forecasting, deal flow | 20%      |       |
| Usability               | Adoption and day-to-day fit      | 15%      |       |
| Platform                | Integrations, admin, security    | 15%      |       |
| Reporting               | Dashboards and management views  | 15%      |       |
| Commercial              | Pricing fit and contract terms   | 15%      |       |
| TOTAL (must equal 100%) |                                  | 100%     |       |

SAMPLE WEIGHT DISTRIBUTION



WEIGHTING PRINCIPLES

- Category (and criterion) weights must sum to 100%.
- Freeze weights before the first scoring session.
- Criteria come from documented requirements — do not invent mid-demo.
- Record owner and freeze date on the cover; archive weight changes.

SAMPLE rows above are teaching placeholders. Replace every weight before scoring. Excel enforces totals; this page is the printable model.

02

# Scoring legend & scorers

1-5 SCORE SCALE

1

**Poor fit**  
Does not meet the requirement in a meaningful way.

2

**Weak**  
Partial capability with major gaps or workarounds.

3

**Adequate**  
Meets the requirement with acceptable trade-offs.

4

**Strong**  
Solid fit with clear evidence from demo / trial.

5

**Excellent**  
Exceeds needs; evidence is strong and consistent.

**N/E = Not enough evidence**  
Do not silently treat N/E as 0. Exclude from weighted totals until resolved, or mark Unknown and schedule follow-up.

CONFIDENCE DEFINITIONS

| LEVEL   | MEANING                                               |
|---------|-------------------------------------------------------|
| HIGH    | Demo, trial, RFP reply, or reference backs the score. |
| MEDIUM  | Partial evidence or single unverified source.         |
| LOW     | Opinion, marketing claims, or thin notes only.        |
| UNKNOWN | Criterion not yet evaluated for this vendor.          |

SCORER SETUP (BLANK)

| NAME | ROLE | CATEGORIES OWNED | SESSIONS | SIGN-OFF |
|------|------|------------------|----------|----------|
|      |      |                  |          |          |
|      |      |                  |          |          |
|      |      |                  |          |          |
|      |      |                  |          |          |
|      |      |                  |          |          |

Assign category ownership before demos. Each score should cite evidence (demo note, RFP ID, trial log). Excel is the scoring engine — keep this sheet aligned with workbook columns.

03

Vendor scoring matrix

EXAMPLE STRUCTURE — criterion names are teaching labels; vendor score cells are blank for your evaluation

Enter 1–5 or N/E per vendor. Leave blank until evidence exists. Weighted totals compute in Excel.

| CRITERION                       | CATEGORY   | MUST? | WT % | A | B | C | D | CONF. | EVIDENCE REF |
|---------------------------------|------------|-------|------|---|---|---|---|-------|--------------|
| EXAMPLE · Pipeline management   | Sales Exec | Y     |      |   |   |   |   |       |              |
| EXAMPLE · Contact & account hub | Core CRM   | Y     |      |   |   |   |   |       |              |
| EXAMPLE · Workflow automation   | Sales Exec | N     |      |   |   |   |   |       |              |
| EXAMPLE · Reporting / forecasts | Reporting  | N     |      |   |   |   |   |       |              |
| EXAMPLE · Usability / adoption  | Usability  | N     |      |   |   |   |   |       |              |
| EXAMPLE · Integrations / API    | Platform   | Y     |      |   |   |   |   |       |              |
| EXAMPLE · Admin & security      | Platform   | Y     |      |   |   |   |   |       |              |
| EXAMPLE · Commercial fit        | Commercial | N     |      |   |   |   |   |       |              |
|                                 |            |       |      |   |   |   |   |       |              |
|                                 |            |       |      |   |   |   |   |       |              |
|                                 |            |       |      |   |   |   |   |       |              |
|                                 |            |       |      |   |   |   |   |       |              |
|                                 |            |       |      |   |   |   |   |       |              |

WEIGHTED TOTAL / 100 (compute in Excel — leave blank here)

A: B: C: D:

Formula note: Weighted score "H £ (score × weight%) with N/E excluded until resolved. Excel is the scoring engine on this page.

04

Must-have gate results

Gates use PASS / FAIL / UNKNOWN only — not Partial. A failed must-have disqualifies that vendor regardless of weighted total.

**RULE: Failed must-have !' vendor is out. Do not average the gap away with a high weighted**

| MUST-HAVE REQUIREMENT         | A                                                                                | B                                                                                | C                                                                                | D                                                                                | NOTES / EVIDENCE |
|-------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------|------------------|
| EXAMPLE · SSO / SAML required | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div></div>      |
| EXAMPLE · Native email sync   | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div><div></div><div>P</div><div></div><div>F</div><div></div><div>U</div></div> | <div></div>      |
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GATE SUMMARY (BLANK)

VENDORS PASSED ALL

FAILED ANY GATE

UNKNOWN REMAINING

READY FOR TOTALS

EXAMPLE rows illustrate table structure only. Mark real gates from your requirements. Resolve UNKNOWN before final recommendation. Partial is not a valid gate result on this scorecard.

05

Criterion deep dive

EXAMPLE TEMPLATE — Pipeline management (replace with your criterion)

Criterion: Category:

Weight %: Must-have? Y / N: Owner:

WHAT “GOOD” LOOKS LIKE (GUIDELINES — BLANK)

EXAMPLE prompt: Stages configurable · forecast roll-up · deal history · mobile update path...

SCORE ANCHORS (1 / 3 / 5 — BLANK)

1 — Poor

Describe failure mode...

3 — Adequate

Describe acceptable baseline...

5 — Excellent

Describe best-in-class evidence...

PER-VENDOR EVIDENCE (BLANK)

| VENDOR | SCORE (1-5 / N/E)    | CONFIDENCE           | EVIDENCE / NOTES     |
|--------|----------------------|----------------------|----------------------|
| A      | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| B      | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| C      | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| D      | <input type="text"/> | <input type="text"/> | <input type="text"/> |

OPEN QUESTIONS FOR THIS CRITERION

Questions to resolve before locking the score...

Duplicate this page structure in Excel or print extras per critical criterion. Keep scores and confidence aligned with the matrix on page 4.

06

Results dashboard

Blank score bars and totals only — fill after Excel computes weighted scores. Do not invent vendor winners.

WEIGHTED SCORES (FILL-IN)

Vendor A

Name:

\_\_\_ / 100

Vendor B

Name:

\_\_\_ / 100

Vendor C

Name:

\_\_\_ / 100

Vendor D

Name:

\_\_\_ / 100

RANK ORDER (BLANK)

#1

Vendor:

Score:

#2

Vendor:

Score:

#3

Vendor:

Score:

#4

Vendor:

Score:

CONFIDENCE SUMMARY (BLANK)

HIGH %

MEDIUM %

LOW %

UNKNOWN %

GATE OUTCOME VS SCORE

| VENDOR | GATES | WEIGHTED /100 | CONFIDENCE | STATUS |
|--------|-------|---------------|------------|--------|
|        |       |               |            |        |
|        |       |               |            |        |
|        |       |               |            |        |
|        |       |               |            |        |

NEXT STEPS

1

Validate assumptions and resolve N/E / UNKNOWN items.

2

Hand off survivors to the CRM Decision Matrix for TCO, risk, sensitivity, and final recommendation.

3

Archive this scorecard with evidence refs and weight freeze date.

Decision Matrix resource: /resources/crm-comparison-worksheet/ — use after scoring for commercial cost, imp

final selection.

07

Decision & sign-off

WORKING RECOMMENDATION (BLANK — NOT A PREFILLED WINNER)

State the leading vendor / option from your scored shortlist — or “no decision yet”. Leave blank until scoring is complete.

KEY REASONS (FROM SCORECARD EVIDENCE)

Must-haves cleared · strongest evidence-backed weighted fit · confidence profile — cite matrix and gates only.

RESIDUAL RISKS / OPEN CONDITIONS

Unknowns, thin confidence areas, commercial or security follow-ups...

STATUS

- ☐ Proceed
- ☐ Proceed with conditions
- ☐ Re-evaluate
- ☐ Archive

SIGN-OFF

| ROLE              | NAME | DATE | SIGNATURE |
|-------------------|------|------|-----------|
| Evaluation lead   |      |      |           |
| Sales / RevOps    |      |      |           |
| IT / Security     |      |      |           |
| Finance           |      |      |           |
| Executive sponsor |      |      |           |

NEXT: DECISION MATRIX !' BUSINESS CASE

Scorecard = how vendors scored during evaluation (weights, 1–5, evidence confidence, must-have gates). Decision Matrix (/resources/crm-comparison-worksheet/) = final selection with TCO, risk, and sensitivity. Then build the CRM Business Case for approval.

Interactive companion: [softwareglimpse.com/tools/crm-vendor-scorecard/](https://softwareglimpse.com/tools/crm-vendor-scorecard/) · Excel remains the scoring engine. Archive this workbook with the frozen weight model.