



CRM platform  
for industrial  
sales teams

### Demo Checklist

	Rank 1-5, 5 being best			
	Vendor 1	Vendor 2	Vendor 3	Vendor 4
<b>Company</b>				
Years in business				
Success in our industry				
Local support				
Hours for support				
<b>Technology</b>				
Open source				
Open API				
Built-in integration modules to standard ERPs				
Outlook integration				
Google apps integration				
Export to Excel				
Integration w/3rd-party email marketing				
<b>Software</b>				
Ease of use				
Expandability (grow as company grows)				
Online help				
Integrated reporting and charting				
Mobile app				
<b>Onboarding</b>				
Program to identify where we should focus				
Onboarding process & procedures				
Program after initial training to keep us moving forward				
Training program				
Online training documents and videos				
<b>Other</b>				
Can our company work with provider?				
Can CRM provider bring value?				
Does CRM provider truly understand our business?				
Does CRM provider have a user council?				
Is CRM provider investing in technology?				
CRM provider's process for prioritizing new development				