
















CRM Requirements Checklist

FUNCTION	DESCRIPTION
 Sales force automation (SFA)	Automates everyday tasks to help salespeople convert leads into sales
 Contact management	Centralizes customer contact information and stores details of each customer interaction
 Sales tracking	Tracks sales pipeline status and revenue
 Marketing automation	Helps marketers target audience and manage multichannel campaigns
 Marketing tracking	Tracks and compares effectiveness of campaigns
 Lead management	Generates, ranks and assigns leads
 Customer service	Case management, customer information retrieval, multichannel support
 Self-service features	Customer support portal, online FAQs
 Knowledge management	Helps capture and share employee knowledge to improve organizational performance
 Workflow automation	Automates repetitive tasks: schedule appointments, send reminders, share calendars or post to social media
 Data management	Ability to integrate data from other business applications
 Business intelligence	Customizable reports, charts and dashboards
 Mobile support	Ability for salespeople and others to access functions using mobile devices
 Data security	Strong protection for customer information, including access controls and audit trails
 Data migration	Ability to easily move current data into CRM