CRM System Reference Checking Questions   Date:

Firm / Organization Contacted:

Person Interviewed:

System Selection / Goals / Requirements

- What are the primary reasons you chose this CRM system?

- What were your requirements / goals for the CRM?

- Has the system meet your goals / requirements?

Rollout / Adoption

- How long have you been using the CRM?

- How are you using the CRM?

- How many users do you have?

- What has the feedback been from users?

Features / Functions

- Has the CRM functioned as expected?

- What features or functions do you use the most? The least?

Sync

- Does the CRM utilize a sync? If so, have there been any sync issues?

Training

- How effective were the training and trainers?

- What kinds of materials were provided?

Benefits / Challenges

- What have you found that the CRM does well?

- What challenges/problems have you had with the CRM?

Service / Support

- How has the CRM provider's customer service and support been?

Implementation / Integration

- How long did the installation take and how challenging was it?

- Have you done any integration with other firm systems and, if so, what have the benefits and challenges been?

Data Quality

- How effective are the system's data quality tools and processes?

Cost

- What was the total cost of the software?

- What are your ongoing costs?

- Were there any unexpected costs or price increases after the sale?

Additional Questions

- If you had to make the purchase again, would you choose this CRM system?

- What is the best advice you could give us regarding the CRM system?