

FREE RESOURCE

CRM Selection Guide

Fifteen questions to ask before you sign with a CRM vendor — fit, integrations, data, and contract.

How to use this guide

Score each CRM you evaluate against these 15 questions. Anything you cannot get a straight answer to is itself an answer.

Fit & workflow

- ☐ Does it model YOUR process — or force you into its default pipeline?
- ☐ Can you customize stages, fields, and task templates without paying a consultant?
- ☐ Does it handle both prospects and clients cleanly, or bolt one onto the other?

Integrations & automation

- ☐ Does it connect natively to your email, calendar, and e-signature tool?
- ☐ Can it trigger tasks and reminders automatically from stage changes?
- ☐ Is there an open API or Zapier/Make connector for everything else?

Data & reporting

- ☐ Can you see every prospect without a next action in one click?
- ☐ Do reports answer "what is stuck?" — not just "what did we close?"
- ☐ Can you export ALL your data, in full, at any time, in a usable format?

Vendor & contract

- ☐ Did you get a real trial with YOUR data — not a scripted demo?
- ☐ Are exit terms in writing: data export, notice period, no hostage fees?
- ☐ Is support human, responsive, and included — or a paid tier?
- ☐ Is pricing per-user transparent, with no surprise modules required for core features?

Ground rules

Never sign without a trial. Never accept "export available on request" — test the export during the trial. And get exit terms in writing before you need them.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com