

## CRM Key Questions to Ask Providers

### Company

1. How long have you been in this business?
2. How many clients have you sold? How many have you lost, and why?
3. What size or types of clients fall into your “sweet spot”?
4. What peripheral or support services do you offer (e.g., eCommerce, custom development, training)?
5. What is your SLA for support issues?

### Products/Services

1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?  
**If perpetual license:**
  - a. What are the hosting requirements?
  - b. What should I expect regarding upgrades (both timing and pain)?
  - c. Do you provide customization/implementation services?
  - d. Can a third party provide customization/implementation?**If SAAS/ASP:**
  - a. Do all tiers include maintenance and support?
  - b. How often are new features introduced?
  - c. What do I do if I need a feature you don't have or plan to have soon?
2. Where is your product's competitive advantage? Campaign management? Support? Flexibility? A particular vertical? Pricing? Don't say “all of the above”.
3. Do you offer a free trial? What's missing in the trial version?
4. What optional services do you provide as part of your solution?
5. How long to implement a basic solution? A sophisticated one?
6. What ROI should I expect from implementing your solution?
7. What type of training do you provide to use your solution?
8. What skills does my organization (or hired third party) need to implement this platform?
9. What technical support services are available?
10. Do you have a support knowledgebase, community forum, or applications that are shared by customers?
11. Which third party product technology eCommerce platform providers have you worked with in the past?
12. How can I export data in the event I need to change platforms? How do I import to get started? How do I ensure I own and control my data

### Features

1. What key features are included in your solution?
  - a. What features are currently missing?
  - b. What features are on your roadmap?
  - c. What features does management love?
2. What is your product's competitive advantage over other packages? Why?
  - a. Price? Dashboard? Ease of use? Flexibility? Don't say “all of the above.”
3. Can I integrate your CRM with my email campaign management tool?
4. How do I tie your CRM with my existing order management system to ensure proper linking of customers to orders?
5. How does your CRM integrate with other systems, such as OMS, WMS, ECP?
6. Can your CRM track customer interactions, orders and issues across all channels?
7. Can my CSRs create their own emails based on my corporate email template?
8. Show me an example of your control panel/dashboard. Is it customizable?
9. If I buy your CRM, do I have to use your other modules (e.g., accounting, eCommerce) in order to get the most out of your features? What degrades if I don't?

### Pricing

1. Do you price by the user, concurrent user, server, site, or other?
2. Why do I want to pay to upgrade to the next level?
3. How do you charge for annual support? What about maintenance?
4. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing)?

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