

# CRM Comparison Checklist

A vendor-neutral one-page worksheet from BusinessMatch AI — [businessmatchai.co](https://businessmatchai.co)

## 1. Feature scorecard (score 1–5 per supplier)

| Feature                                    | Supplier A | Supplier B | Supplier C |
|--------------------------------------------|------------|------------|------------|
| Contact & pipeline management              |            |            |            |
| Email / calendar integration               |            |            |            |
| Reporting & dashboards                     |            |            |            |
| Automation & workflows                     |            |            |            |
| Mobile app usability                       |            |            |            |
| Integrations (accounting, marketing, etc.) |            |            |            |
| Ease of setup                              |            |            |            |
| Support & training                         |            |            |            |

## 2. Pricing comparison

| Item                            | Supplier A | Supplier B | Supplier C |
|---------------------------------|------------|------------|------------|
| Price per user / month          |            |            |            |
| Minimum users / contract length |            |            |            |
| Setup or onboarding fee         |            |            |            |
| Cost of add-ons you need        |            |            |            |
| Estimated year-1 total          |            |            |            |

## 3. Questions to ask every supplier

- ☐ 1. Which of our must-have features are included in the standard price?
- ☐ 2. How is our data stored, backed up and exported if we leave?
- ☐ 3. What does onboarding look like — who does the setup and training?
- ☐ 4. What is your typical response time for support, and is it included?
- ☐ 5. Which integrations do you support out of the box vs. via a third party?
- ☐ 6. How often is the product updated, and what has changed in the last year?
- ☐ 7. Can we speak to two customers of a similar size and industry?
- ☐ 8. What happens to the price at renewal, and what are the cancellation terms?