## CRM SOFTWARE DECISION MATRIX

Prioritisation Criteria	Value	Score	
<b>Industry-specific</b> : The CRM has features tailored to the needs of your industry, such as relevant terminology, compliance, project management, client communication & document management.			
<b>Customisation options</b> : The CRM allows customisation to adapt to the specific workflows and processes of your business.			
<b>Cost and ROI</b> : The total cost of ownership (upfront and licencing) as well as consider the likely return on investment (ROI) in the long term.			
<b>Integration capabilities</b> : Compatibility with third party tools and systems (via API), such as your website, accounting software, project management tools, and email platforms.			
<b>Training and support</b> : Understand the availability and quality of training resources and customer support as well as any service level agreement.			
User permissions and access controls: Ability to implement role-based access controls to safeguard sensitive information and control user permissions.			
<b>Data security &amp; migration</b> : Robust security measures to protect sensitive client and project information as well as the ability to migrate data in and out of the CRM in useable format.			
<b>User-friendly interface across devices</b> : An intuitive interface to reduce training time and encourage user adoption. Plus compatible with mobile and various operating systems.			
Automation features: Automation tools to streamline repetitive tasks and workflows, saving time and reducing errors.			
<b>Vendor reputation</b> : The reputation and reliability of the CRM vendor in the industry. Check existing customers, case study examples and testimonials.			
	Total		



