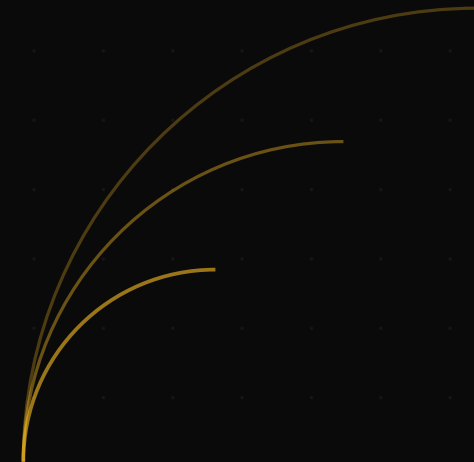


REVENUE, SALES OPS, AND IT LEADERS

How to evaluate a CRM vendor

CRM evaluation for buyers: data quality and migration, territory and routing complexity, user adoption, API limits, and the integrations that get under-scoped.



WHAT'S INSIDE

4 steps in this guide

- 01 Data quality is the first landmine
- 02 Territory and routing rules are deceptively hard
- 03 Adoption decides ROI
- 04 API limits are a runtime risk

CRM projects fail on adoption far more often than on features.

01**Data quality is the first landmine**

CRM consolidation routinely uncovers data-quality issues invisible at scoping: duplicate contacts, broken account hierarchies, and activity history that won't map cleanly. Deduplication and hierarchy reconstruction are almost always underestimated. Require a data-profiling step and a migration workplan before you agree a fixed price.

02**Territory and routing rules are deceptively hard**

Configuring sales territories and lead-routing logic is disproportionately complex relative to the time vendors allocate, and it's politically charged - every territory change creates stakeholder-driven scope creep. Get the rules defined and signed off before configuration starts.

03**Adoption decides ROI**

User adoption failure is the primary cause of CRM ROI failure. Sales teams resist new tools. Adoption tracking, manager accountability metrics, and executive dashboards must be in scope - not assumed. Ask the vendor what their adoption programme actually includes.

04**API limits are a runtime risk**

High-volume integrations can hit daily API limits in production, causing silent sync failures. Confirm the limits for your edition and model your real integration volume against them before go-live.

PUT THIS TO WORK

Walk into every evaluation with the vendor's own playbook.

- A vendor-proof scope, issued before any proposal
- Gap analysis scoring every proposal against your scope
- A risk-weighted interrogation kit for the vendor meeting
- Scope-drift detection across proposal versions

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