

The 2026 checklist for first-time CRM buyers

- ✓ Identify what to look for in a CRM
- ✓ Spot red flags early
- ✓ Compare vendors with confidence

Are you researching CRM systems? 💡

Before you dive into demos and vendor pitches, make sure the system you're exploring actually supports how you sell, serve, and grow.

Use this checklist to make sure the solutions you're exploring actually fit your needs.

What's inside:

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★ **Bonus!** Key questions to ask in every CRM demo.



1. Define your business goals

Before you compare vendors, ask yourself:

- ☐ What problems are we trying to solve (e.g. pipeline visibility, forecasting, customer retention)?
- ☐ Which departments will use the CRM? Sales, marketing, service, or all?
- ☐ What does success look like after 12 months?

 **Tip: Map your current processes before you buy. The right CRM should fit your workflow, not force you to change it.**

2. Clarify your technical needs

- ☐ Does it integrate easily with your existing tools (ERP, email, marketing automation)?
- ☐ Is it available in the cloud and on mobile?
- ☐ Can it scale as your company grows?
- ☐ How secure is the data (GDPR compliance, hosting, permissions)?

💡 **Cloud CRM offers lower setup costs, automatic updates, and access from anywhere, a must for hybrid teams.**


3. Evaluate usability and adoption

☐ Is the system intuitive for end users, not just admins?

☐ How much training and onboarding support is included?


☐ Does the vendor offer local support and guidance?

☐ How customizable is the interface for our daily work?

 **Ease of use is the single biggest factor in CRM adoption success. If people don't use it, it doesn't work.**

4. Assess the vendor behind the product

- ☐ Do they understand your industry and company size?
- ☐ Do they have proven experience and customer references?
- ☐ Are they a long-term partner, not just a software provider?


 **Look for a vendor with a strong local presence and a focus on relationship-building, not one-size-fits-all deals.**

5. Measure value and ROI

☐ Does the CRM help us increase sales and productivity?

☐ Can it automate key tasks and improve data visibility?

☐ How does it support long-term customer relationships?

 **Companies that invest in CRM see an average return of \$8.71 for every \$1 spent.**

(Data source: Nucleus Research)

★ Bonus: Questions you should ask in every CRM demo

- ☐ How quickly can we see ROI?
- ☐ How customizable are dashboards and reports?
- ☐ How does your team support adoption after go-live?
- ☐ How does your CRM handle GDPR and data export requests?
- ☐ Can you show how this works for a company like ours?



Planning your 2026 CRM strategy? 🧐

Let's see how your current setup stacks up.

Book a demo today, at
www.superoffice.com