

CRM FIT FINDER WORKSHEET



A guided workbook to help you choose the right CRM based on your process, goals, and team — not just flashy features.



1. WHAT ARE YOU TRYING TO FIX?

Mark what feels broken right now:

- Leads falling through the cracks
- I can't see what my team is working on
- Follow-up is inconsistent
- Sales cycle is longer than it should be
- Clients feel lost or confused
- I don't know what's working in my marketing

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- **Lead Sources:**
- **Qualification Steps:**
- **Booking / Proposal / Close Steps:**
- **Onboarding Steps:**
- **Ongoing Communication:**

A hand is shown using a black calculator on a wooden desk. The background is a blurred office setting. Overlaid on the image are numerous colorful icons representing various business and financial concepts, including a gear, a calendar, a folder, a telephone, a gift, a magnifying glass, a bar chart, a minus sign, a server rack, a pencil, a ruler, a plus sign, a minus sign, a multiplication sign, a division sign, a percentage sign, a dollar sign, a euro sign, a pound sign, a yen sign, a rupee sign, a won sign, a new sheqel sign, a South African rand sign, a Brazilian real sign, a Chinese yuan sign, an Indian rupee sign, a Thai baht sign, a Vietnamese dong sign, a Philippine peso sign, a Singapore dollar sign, a Hong Kong dollar sign, a Macao pataca sign, a New Zealand dollar sign, a Canadian dollar sign, a Mexican peso sign, a Central American dollar sign, a Caribbean dollar sign, a Cuban peso sign, a Dominican peso sign, a Guatemalan quetzal sign, a Honduran lempira sign, a Nicaraguan córdoba sign, a Panamanian balboa sign, a Salvadoran colón sign, a Uruguayan peso sign, a Venezuelan bolívar sign, a Colombian peso sign, a Peruvian sol sign, a Bolivian boliviano sign, a Paraguayan guaraní sign, a Chilean peso sign, a Argentine peso sign, a Brazilian real sign, a Mexican peso sign, a Central American dollar sign, a Caribbean dollar sign, a Cuban peso sign, a Dominican peso sign, a Guatemalan quetzal sign, a Honduran lempira sign, a Nicaraguan córdoba sign, a Panamanian balboa sign, a Salvadoran colón sign, a Uruguayan peso sign, a Venezuelan bolívar sign, a Colombian peso sign, a Peruvian sol sign, a Bolivian boliviano sign, a Paraguayan guaraní sign, a Chilean peso sign, and an Argentine peso sign. The word "PROCESS" is written in large, bold, blue capital letters across the center of the image.

3. FEATURE FILTER - MUST-HAVE VS. NICE-TO-HAVE

Feature	Must-Have	Nice-to-Have	Not Needed
Email templates			
Calendar integration			
Proposal/eSignature integration			
Client portal			
Mobile access			
Task management			
Automation & workflows			
Custom fields / tags			
Industry-specific compliance tools			



4. PLATFORM FIT QUESTIONS

Answer these to narrow down your options:

1. Do you need it to integrate with your current tools (e.g., QuickBooks, Zoom, PandaDoc)?
2. How tech-savvy is your team (scale of 1–10)?
3. Do you want everything in one platform (CRM + billing + PM), or prefer separate tools?
4. How many people will use the CRM?
5. Do you want to automate communications?



5. FINAL FIT SCORECARD

CRM Option	Ease of Use	Setup Cost	Matches Our Workflow	Scales with Us	Total Score
Pipedrive					
ClioManage					
SuiteDash					
HubSpot Starter					

Choose your top 2 to explore further, and don't commit until you've mapped your process to the tool.



SCAN HERE



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