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 ☐

!! CRITICAL SYSTEM FAILURE !!

QUICK FIX

2. Your Sales & Service Process Snapshot

Fill in the key pieces of your client journey:

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

Where do you feel the most stress or drop-offs?

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.

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