WOW
Success
Team
BIZNESS ENGINEERING

CRM Selection Toolkit

Compare Options, Ask the Right Questions, and
Pick a CRM That Grows With You

CRMs are not one-size-fits-all.

This toolkit is your shortcut to clarity—
giving you the right questions, a feature
checklist, and side-by-side comparisons
so you can choose with confidence.

SECTION 1:
CRM Readiness Checklist

Statement   **Check**

☐ I regularly follow up with leads or clients

☐ I manage a sales or service pipeline

☐ I want visibility into team or personal performance

☐ I use more than one tool for client communication

☐ I plan to scale and need automation

🟢 4–5 checks: You're ready for CRM
🟡 2–3 checks: You may be ready for a CRM
🔴 0–1 checks: Focus on process clarity first

SECTION 2:
CRM Decision Worksheet

Primary Goal of CRM Use:
Examples: Sales tracking, onboarding, client service, automation, email marketing, contact management, etc.

My Top 5 Must-Have Features:
1. _____
2. _____
3. _____
4. _____
5. _____

Top 3 Tools It Needs to Integrate With:
1. _____
2. _____
3. _____

Preferred Budget Range (Monthly):
$_____ - $_____

Team Users to Onboard:
_____ users

SECTION 3:
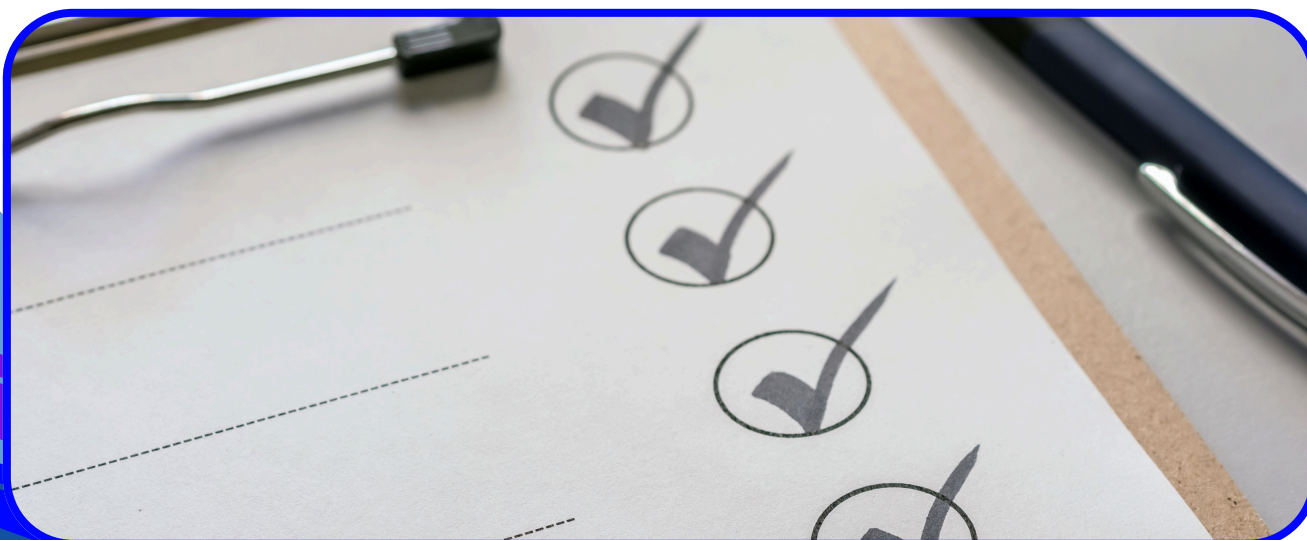## CRM Comparison Grid (we can provide many, many more if needed)

CRM	Ease of Use	Key Features	Integrations	Price Range
Pipedrive	★★★★	Sales pipeline, automatic	Gmail, QuickBooks, Zapier	$14–$99/mo
HubSpot	★★★	Marketing & CRM	Google Suite, Stripe, CMS	Free–$800+/mo
Zoho	★★	CRM + apps	Google, Slack, finance tool	$0–$65/mo
SuiteDash	★★★	All-in-one suite	Zapier, Stripe, Zoom	$19–$99/mo
Salesforce	★★	Unlimited power	Everything (with effort)	$25–$300+/mo

SECTION 4:
Feature Checklist Template

Feature	Must-Have	Nice-to-Have	Not Needed
Email sync & logging	☐	☐	☐
Sales pipeline stages	☐	☐	☐
Client portal access	☐	☐	☐
Automations & reminders	☐	☐	☐
Reporting/dashboard	☐	☐	☐
API/third-party integrations	☐	☐	☐
Mobile access	☐	☐	☐

Next Step:
Don't Choose Alone

📅 Want help narrowing down your top 3 CRM options based on your real-life needs?

👉 Book a free CRM Discovery Session with WOWSuccessTeam and figure out what works for your business.

Schedule Now

https://calendly.com/wowsuccessteam/crm-q-and-a-meeting