EVALUATION FRAMEWORK & SCORECARD

7-Point CRM Free Trial Evaluation Scorecard

Use this objective rubric across every vendor trial so your final software investment is backed by documented evidence, user adoption readiness, and true operating efficiency—not memory or sales demos.

CRM Platform / Vendor	Trial Lead / Evaluator	Evaluation Date	Trial Expiration
ConvergeHub			

Scoring Guidelines: Score each dimension from 1 (Clunky / Missing / Requires Expensive Add-on) to 5 (Seamless / Intuitive / Native Out-of-the-Box). A total score of 28+ indicates high production viability.

#	EVALUATION DIMENSION	KEY TRIAL VERIFICATION CRITERIA	SCORE (1–5)
1	**User Adoption & Navigation** Interface clarity and minimal friction for everyday team workflows.	Can a sales rep log a call, update deal status, or add a contact in under 3 clicks? Is the layout intuitive without requiring weeks of structured training?	☐
2	**Pipeline & Deal Visibility** Stage tracking, revenue forecasting, and deal velocity awareness.	Are pipeline stages fully customizable to your sales process? Does the visual Kanban board clearly spotlight stalled opportunities, next actions, and overdue tasks?	☐
3	**All-in-One Convergence** Unified suite eliminating separate subscriptions and disconnected apps.	Can your team handle sales leads, marketing campaigns, customer support tickets, and quotes from a single customer record without switching between siloed tools?	☐
4	**Workflow & Task Automation** Eliminating routine manual tasks and administrative busywork.	Can non-technical managers trigger auto-responder emails, assign reps, and create task reminders upon new form submissions without hiring a specialized developer?	☐
5	**Native Communications Sync** Two-way email sync, calendar integration, and interaction logs.	Does the CRM provide bi-directional synchronization with your primary email (Gmail/Outlook) and calendar? Does the full conversation history attach automatically?	☐
6	**Quotes & Billing Integration** Direct bridge from opportunity to invoice and payment tracking.	Can sales reps instantly produce estimates, formal proposals, and invoices straight from the deal screen, preventing dropped handoffs between sales and accounting?	☐
7	**Total Cost of Ownership** Transparent pricing scaling, predictable renewals, and human support.	Is pricing transparent as seat count grows without mandatory enterprise upgrades? Does the vendor provide responsive human onboarding and technical assistance?	☐
		OVERALL PLATFORM TRIAL SCORE — TOTAL:	**/35**

Prioritize the criteria that matter to your business. A straightforward CRM your team uses is always more valuable than a complex platform it avoids.

Ready to test an all-in-one platform built for SMB growth? **Book a Demo →**