ConvergeHub

THE PRACTICAL DEMO & FREE TRIAL DECISION KIT

CRM Evaluation Scorecard

Compare CRM platforms, evaluate AI capabilities, and make a buying decision your team can explain.

COMPARE UP TO THREE CRM PLATFORMS

01
Demo
Ask for proof

02
Trial
Test your workflow

03
Decide
Compare evidence

Make Your Next CRM Decision with Confidence

02 / BUYER WORKSHEET

How to use this evaluation kit

Use the same workflow, sample data and scoring criteria across every vendor. Open the editable workbook as you go.

Identify your requirements

Agree on your essential workflows, budget, owners and decision date before the first demo.

Ask vendors to show their work

Give every vendor the same scenario. Record the plan, what you saw and any follow-up due.

Run the trial with your team

Use fictional or approved anonymized records. Have a daily user run the workflow from start to finish.

Score your shortlist

Enter verified scores in Excel. Check coverage and review any essential requirement marked Failed or Unverified.

Make the buying decision

Compare first-year costs on the same basis. Record the decision, open conditions and who will close them.

One scenario to reuse

Capture → assign → follow up → close → hand off → review the account.

03 / BUYER WORKSHEET

CRM requirements checklist

Mark one priority per row. For each Essential item, write a pass condition in the workbook before the first demo.

REQUIREMENT	Essential	Important	Optional	Not req.
Lead capture and management	☐	☐	☐	☐
Contact and account management	☐	☐	☐	☐
Sales pipeline management	☐	☐	☐	☐
Marketing and customer engagement	☐	☐	☐	☐
Email, phone, and SMS communication	☐	☐	☐	☐
Workflow automation	☐	☐	☐	☐
Reporting and dashboards	☐	☐	☐	☐
Customer service and relationship management	☐	☐	☐	☐
Billing and revenue management	☐	☐	☐	☐
Integrations and customization	☐	☐	☐	☐
Data security and access controls	☐	☐	☐	☐
Scalability and pricing	☐	☐	☐	☐

The first workflow we need to prove

04 / BUYER WORKSHEET

12 questions to ask during a CRM demo

Ask the vendor to show each relevant answer using your scenario. Capture the plan, evidence and any open questions.

01 How does the CRM capture and organize leads?

02 Can we customize the sales pipeline?

03 How does the platform manage customer interactions?

04 Can we automate repetitive sales and business processes?

05 What communication channels are supported?

06 What reporting and performance visibility does the platform offer?

07 What integrations are available?

08 How does the platform support customer retention?

09 What AI capabilities are included?

10 How does AI help identify lead readiness and customer intent?

11 Can the platform identify customer relationships that may be cooling?

12 How does the CRM support expansion opportunities and the broader revenue lifecycle?

05 / BUYER WORKSHEET

What to test before your CRM trial expires

Use the same sample records across your shortlist. Mark each completed test Good, Average or Poor and record what happened.

TEST	DONE?	RESULT	NOTES
Capture a lead and confirm its owner and source	☐		
Import sample contacts and check duplicate handling	☐		
Move a deal through your actual pipeline stages	☐		
Log a call or email and find it from the account	☐		
Build an assignment rule and test its exception path	☐		
Send or log a message in your priority channel	☐		
Rebuild a report your team actually uses	☐		
Sync a test record and check how failures surface	☐		
Ask a teammate to complete a task without coaching	☐		
Hand off an account and check role permissions	☐		
Run the four AI checks on the next page	☐		
Walk through a renewal, quote or invoice handoff	☐		

06 / BUYER WORKSHEET

Put CRM AI to the test

Run these scenarios with sample data. Check whether an insight explains what it used and gives your team a practical next action.

Lead readiness

Use two sample leads with different engagement histories. Ask why each was ranked and what action the system suggests.

Intent understanding

Use an early pricing inquiry and a later timeline objection. Check whether the system distinguishes interest from readiness and links to supporting interactions.

Cooling relationships

Use a previously active account with a quiet period. Check what triggered the signal, who sees it and whether they can route a follow-up.

Expansion opportunities

Use a sample account with an additional team asking for access. Verify whether the product explains the signal and lets an owner act on it.

Ask every vendor

- Which interactions or records inform the insight?
- Where does it appear, and which roles can see it?
- What action can a user take, and can they override the suggestion?
- Can it support our workflow, and what happens with sparse data?
- Is it available in our plan or trial, and what limits apply?

07 / BUYER WORKSHEET

Compare your CRM shortlist

Use 1–5 for verified capabilities and N/A for untested items. An observed gap earns a 1. Review evidence coverage before comparing scores.

CATEGORY	CRM A	CRM B	CRM C
Lead management			
Sales pipeline			
Workflow automation			
Communication management			
Reporting and visibility			
AI lead readiness scoring			
AI intent understanding			
Relationship monitoring			
Expansion opportunity identification			
Integrations			
Ease of use			
Pricing and overall value			

1 Misses requirements · 2 Limited · 3 Meets basics

4 Meets most requirements · 5 Strong fit

An essential gap can outweigh a high score.

Use the Excel workbook to see scored coverage and open essential checks.

08 / BUYER WORKSHEET

Which CRM fits your business?

Use this page to record the decision and the evidence your team will want to revisit.

Which CRM best matches our essential requirements?

Which platform offers the best usability?

Which platform provides the AI capabilities we need?

Which platform supports our complete customer lifecycle?

Which platform offers the best overall value?

What concerns or limitations remain?

What additional information do we need before deciding?

Decision, reasons and next action

09 / BUYER WORKSHEET

Put ConvergeHub on your shortlist

Bring one workflow you want to improve and one requirement you need to verify.

Run the same evaluation on ConvergeHub

ConvergeHub brings sales, customer service, billing and automation into one CRM. Its AI Assistant supports email drafting and note-taking. Ask the demo team to show which AI insights and limits apply to the plan you are evaluating.

What to bring to your demo

Share a fictional example of a lead handoff, a stalled deal, or a customer renewal. Ask to see who can act, what gets recorded and what your plan includes.

Request a Demo

Start Free for 14 Days

Published by ConvergeHub

The scorecard applies the same criteria to every vendor. Product details come from ConvergeHub’s public pages.

Product overview

AI Assistant

Plans and pricing