The 7-Point CRM Free Trial Evaluation Checklist

What to Test Before Choosing Your Next CRM

Run the same test in every trial

Use the same sample records and workflows for each CRM. Ask one rep and one manager to run the tests independently, then compare where they got stuck.

0 = blocked / 1 = workaround needed / 2 = passes

CRM _____ **TEST DATE** _____

01 Lead & Contact Management

Try Add a lead, import a small CSV with one duplicate, assign an owner, and find the lead by email.

Pass if You can find the right record, see its owner, and resolve the duplicate.

SCORE ☐

02 Sales Pipeline & Deal Management

Try Create an opportunity, add a value and close date, move it to the next stage, and set a next action.

Pass if A manager can see the stage, value, owner, and next action at a glance.

SCORE ☐

03 Follow-ups & Automation

Try Schedule a reminder and set a rule to create a follow-up task when a deal changes stage.

Pass if The right rep receives the reminder and the rule creates only one task.

SCORE ☐

04 Reporting & Analytics

Try Run a pipeline and conversion report. Filter by owner and date, then trace one total to its source records.

Pass if A manager can explain the numbers and spot where deals are getting stuck.

SCORE ☐

Test team fit and data control

Keep the same scoring scale and record any deal-breakers.

05

Ease of Use & Team Adoption

Try Ask a rep to add a contact, update a deal, and log a call without coaching.

Pass if The rep completes the workflow and can repeat it without help.

SCORE

06

Integrations & Scalability

Try Connect one essential tool and sync a test record. Check user, record, and automation limits on the plan you would buy.

Pass if The sync works and the plan has room for expected growth.

SCORE

07

Support, Security & Data Management

Try Test a restricted role, contact support, and export sample records. Ask how long trial data is retained.

Pass if Access is restricted as expected, support responds, and you can open the export.

SCORE

Make the shortlist

TOTAL / 14

Add the seven scores and compare CRM options side by side. Resolve any failed must-have before shortlisting, even if the total is high.

Must-have gap or question for the vendor

Bring your checklist to a ConvergeHub demo

Ask us to walk through your sales workflow and the items you could not verify in the trial.

Request a live demo

www.convergehub.com/product/request-demo