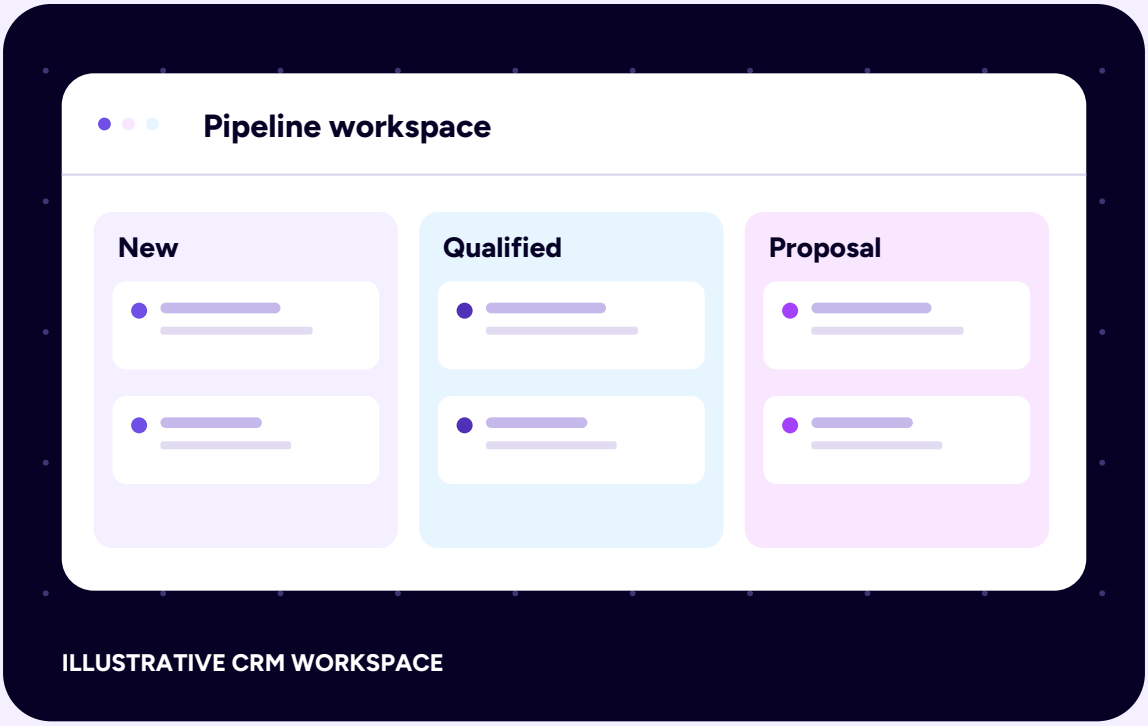
The 10-Point CRM Testing Scorecard:

Test Before You Invest

Run the same workflows in each CRM trial and compare what your team can actually get done.



ILLUSTRATIVE CRM WORKSPACE

GET STARTED

How to use the scorecard

For business owners, sales leaders, marketing managers and CRM buying teams.

1

Set up a fair test

Use the same fictional leads, deals and customer records in every trial. Record the plan, enabled add-ons and the must-have workflows.

2

Run the workflows

Use one copy per CRM. Ask the people who will own the work to complete the tasks and record what happened, including setup effort and workarounds.

3

Rate the evidence

Give each criterion one score from 1 to 5. Leave untested items blank and use the notes to capture what you still need to verify.

THE 1–5 RATING SCALE

1	**Unavailable**	You confirmed the workflow is unsupported.
2	**Workaround**	It runs through manual steps or an external tool.
3	**Adequate**	The core workflow works with some friction.
4	**Strong**	The workflow works end to end with minor setup.
5	**Excellent**	The workflow is repeatable, easy to run and meets your requirements.

Type in a PDF reader that supports forms, or print a copy. Save one completed copy per CRM and transfer the ratings to page 6.

CRM EVALUATION

Lead to opportunity

Test how leads enter the CRM, get prioritized and move through the pipeline.

CRM PLATFORM / PLAN

01 Lead Capture and Management

- Submit the same lead twice through a form or import. Does the CRM flag the duplicate and retain its original source?
- Can you route it to the right owner and see when they follow up?

RATING (1–5) | NOTES / EVIDENCE

02 AI-Powered Lead Intelligence

- Give the AI leads with different activity histories. Can it prioritize them and explain its reasoning?
- Can a rep verify the inputs and correct a bad suggestion?

RATING (1–5) | NOTES / EVIDENCE

03 Sales Pipeline Management

- Move a test deal from qualified to won. Can you require stage data and see the new value in the forecast?
- Can a manager quickly find deals with no upcoming action?

RATING (1–5) | NOTES / EVIDENCE

Opportunity to payment

Follow the work across conversations, tasks, invoices and payments.

04 Unified Communication

- Send a test email and log a call or message. Do both appear on the same customer timeline?
- Can a teammate see the thread and reply using the right channel?

RATING (1–5)	NOTES / EVIDENCE

05 Revenue-Focused Automation

- Trigger a follow-up when a deal stalls. Does it create the right task or send the right message?
- Does the rule stop after a reply, and can you inspect failures?

RATING (1–5)	NOTES / EVIDENCE

06 Billing and Payment Management

- Turn a won deal into an invoice. Can you record a test payment and see its status on the customer record?
- Can finance find overdue balances and reconcile payments?

RATING (1–5)	NOTES / EVIDENCE

Retention and fit

Test customer growth, essential integrations and industry-specific workflows.

07 Customer Retention

- Set a renewal date and log a support issue. Does the owner get a timely reminder?
- Can the owner see the issue and renewal in one place before reaching out?

RATING (1–5)	NOTES / EVIDENCE

08 Expansion and Referral Management

- Create an upsell and a referral from one account. Can you track each through to close?
- Can you report expansion revenue and attribute the referral?

RATING (1–5)	NOTES / EVIDENCE

09 Integrations and Connectivity

- Connect a must-have app. Can you sync a new record and a later edit with the correct field mapping?
- Can you detect a failed sync, retry it and avoid duplicates?

RATING (1–5)	NOTES / EVIDENCE

10 Industry Flexibility

- Model a workflow specific to your industry. Can an admin configure its fields, stages and permissions?
- Can you report on it after changing a field or stage?

RATING (1–5)	NOTES / EVIDENCE

DECISION WORKSHEET

Compare your shortlist

Copy each CRM's ratings into a column. Add the ten ratings to get its total out of 50.

CRM platform / plan	PLATFORM A	PLATFORM B	PLATFORM C
01 Lead Capture and Management			
02 AI-Powered Lead Intelligence			
03 Sales Pipeline Management			
04 Unified Communication			
05 Revenue-Focused Automation			
06 Billing and Payment Management			
07 Customer Retention			
08 Expansion and Referral Management			
09 Integrations and Connectivity			
10 Industry Flexibility			
TOTAL / 50			
FIRST-YEAR COST			

Compare totals after all ten criteria are tested. For cost, use the same currency and include seats, setup, add-ons and usage fees.

MUST-HAVE GAPS OR UNTESTED ITEMS

PREFERRED CRM AND NEXT STEP

ConvergeHub

AI-powered Revenue CRM

ConvergeHub brings sales, marketing, service and billing into one CRM. Use your scorecard to see how well it handles the work your team does every day.

AI assistance for everyday work

Draft and personalize emails, organize notes and review AI-generated content before using it.

Pipeline and follow-up

Manage leads and deals, assign ownership and trigger workflow tasks or notifications.

Billing and customer service

Create invoices, track payments and manage support cases alongside customer records.

Put your test case to work

Bring one sample lead and one recurring workflow to a trial or demo. Check which features are included in the plan you're evaluating.

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