ConvergeHub

Free CRM Trial: Features to Test Before Buying

The Practical CRM Trial Evaluation Checklist

Use the same sample data in each trial. Fill out one copy of this page per CRM.
Rate completed tests from 1 (poor fit) to 5 (excellent fit).

The 7 feature tests

CRM _____

01 Lead management

Add three sample leads, group them by source, and assign one to a teammate.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

02 Sales pipeline

Create a sample deal and move it through two pipeline stages.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

03 Automation

Set a follow-up reminder and trigger an automated task on a sample deal.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

04 Marketing

Draft a sample campaign and segment contacts by a field such as industry.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

05 Customer support

Create a sample support case and assign it to a team member.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

06 Reporting

Generate a sales performance report and filter it by owner or date.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

07 Integrations

Check whether your key tools connect and test one connection if available.

☐ Tested ☐ Not Tested Rating (1-5) ____ Observations _____

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CRM evaluation scorecard

Enter the platform names and score each criterion from 1 (poor fit) to 5 (excellent fit).
Use N/A when you could not test a criterion.

Evaluation criteria	CRM 1	CRM 2	CRM 3
Ease of use			
Feature availability			
Automation			
Reporting			
Team suitability			
Integration options			
Overall experience			

Your final decision

Which CRM best meets your business requirements?

Which features are missing?

What would you like to clarify before purchasing?

See your workflows in ConvergeHub

Bring your checklist and ask to see your must-have workflows in a live demo.

Request a ConvergeHub demo