

Manufacturing CRM Checklist

Use these questions to guide your selection of manufacturing CRM software.

1. Will the CRM do forecasting the way I need it to?
2. Does the quoting tool in this CRM have configuration capabilities?
3. Does the CRM offer a way for me to price opportunities by my own metrics (ex: sq. feet or gallons over dollars)?
4. How will this CRM increase my pipeline visibility?
5. How easy it is to generate dealer and territory scorecards/performance with this CRM?
6. Is it mobile, offline, and Cloud accessible?
7. Do I have the option of connecting this CRM to my quoting or ERP systems?
8. Does this CRM automate notifications and scheduling?
9. Does this CRM track quotes by end user, distributor, and partner?
10. Can I track product line order volumes? Demand indicators?
11. Can I feed my inventory information into this CRM?
12. Does this CRM let me check product defect/return rates and warranty registrations?
13. Will this CRM connect with my existing email provider?
14. Will this CRM connect easily to an eSignature solution?
15. How will this CRM help me manage my dealer network? Supply chain?
16. Will I be able to see education/certification levels of dealer employees with this system?
17. How will this CRM help me automate quote or discount approvals and back-order requests?
18. Can I use this CRM to automate and keep track of meetings?
19. How will this CRM help me understand and differentiate my product lines and their performance?
20. Does the CRM offer Workflows for organizing my processes?
21. Does the CRM have different login permissions for various departments or outside partners?