

Choosing the right CRM: 7 key questions to ask before you commit

Looking for a CRM? Then it's crucial to avoid common pitfalls. Choosing the right system starts with asking the right questions ...

Common pitfalls	Questions to ask
 Unclear goals	 "What are our actual needs?" → Define your goals and who the system will be used by.
 Wrong project team	 "Who needs to be at the table?" → Involve users, leadership, and decision-makers from the start.
 Trying to do everything at once	 "What's the bare minimum to get started?" → Start with a minimal version, then grow step by step.
 Weak change management	 "How do we bring everyone along?" → Create a change plan with training, feedback, and champions.
 Poor data quality	 "Is our data reliable and ready?" → Assign ownership and clean up your data before go-live.
 No integrations	 "How will this CRM fit into our workflows?" → Ensure the CRM fits your tech stack: email, customer support tools, finance tools, etc.
 No plan for evolution	 "How will we keep improving?" → Create a roadmap and user feedback loop for continuous improvement.

Choose the right CRM for your business
At Efficacy, we want to help you select your CRM with confidence.

Download our free RFP guide and template to set your project up for success.

Download the RFP guide and template

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