

# How to write a winning CRM RFP

This guide is intended to assist you in drafting a Request for Proposal (RFP) to select a CRM solution that meets your business needs. It outlines essential sections, key questions, and best practices and serves as a blueprint for evaluating vendors.

**RFP template included**



# Choose the right CRM with confidence

Selecting a CRM is a strategic investment. A strong RFP helps you avoid misalignment, identify the best-fit vendors, and streamline decision-making. Use this guide to implement a confident, collaborative, and outcome-driven CRM procurement process. It provides a structured and objective approach to making complex business decisions. In short, an RFP helps you make smarter, faster and lower-risk decisions, avoids costly CRM mistakes and ensures successful implementation.

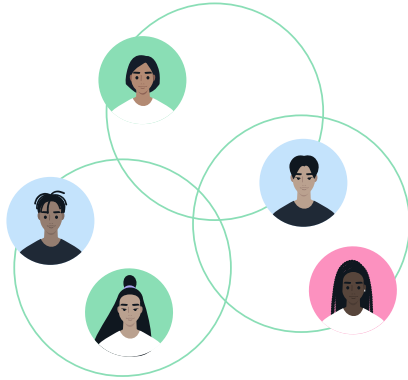
## **A well-crafted RFP**

- Sets clear expectations
- Streamlines communication
- Aligns business needs

## This guide helps you:

- ✓ Define clear CRM requirements
- ✓ Structure a comprehensive RFP
- ✓ Effectively compare vendor solutions
- ✓ Avoid common pitfalls in CRM selection and implementation






# 1. Clarify the business requirements

Explain why your company is seeking a CRM solution.

Include:

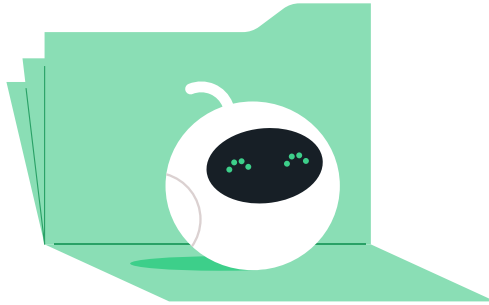
- **Brief overview of your organisation**
- **Specific goals: automated marketing, enhanced reporting, improved retention, etc.**
- **Number of CRM users**
- **Current systems in place (CRM or otherwise)**
- **Strategic growth plans (if relevant)**



Involve stakeholders from sales, marketing, customer service, and IT early in the process to paint a full picture of why you need a CRM system and what you need it to do.

Example

**“ We need a CRM that integrates seamlessly with our email marketing platform and customer support system.”**



## 2. Document functional requirements

Create a categorised checklist of features of your CRM. You can categorise these in terms of 'need to have' (essential) and 'nice to have'.

### Sample categories:

- **Sales & contact management:** opportunity tracking, sales dashboard to monitor KPIs (e.g. pipeline, forecast, conversion, etc.), lead management, workflow automations, relationship categorisation and networks, business quotations with option of digital approval, Ai support

- **Marketing automation:** creation of campaigns & monitoring of results, creation & follow-up of newsletters, call lists, email automation, easy customer segmentation, leads and enquiries management, Ai support
- **Customer support:** FAQs, follow-up customer enquiries, complaints and support requests, customer service dashboard to monitor KPIs (e.g. turnaround time, enquiries/complaints per product, etc.), monitoring of satisfaction rate
- **Reporting & analytics:** dashboards, conversion reports
- **Integrations:** email, calendars, e-commerce platforms
- **Mobile access:** iOS/Android support

Example

**“Must offer advanced segmentation capabilities and automated follow-up workflows. ”**



### 3. Define technical requirements

Specify what's needed from a technology and compliance standpoint.

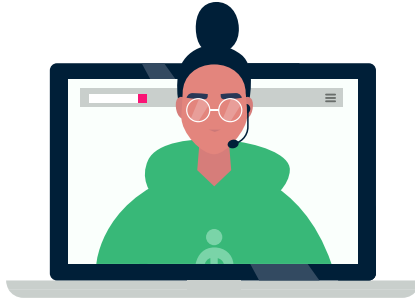
Key points:

- **Deployment: cloud or on-premise**
- **Browser compatibility**
- **Data residency and compliance**
- **Security**
- **Integration with other tools**
- **Compliance (e.g. GDPR)**



Example

**“The CRM should support integration with existing ERP and email marketing software.”**



## 4. Define vendor support and training

Define your expectations for post-purchase onboarding, training, and support.

Implementation services:

- **Estimated implementation timeline**
- **Project management methodology**
- **Data migration and system integration support**

Training:

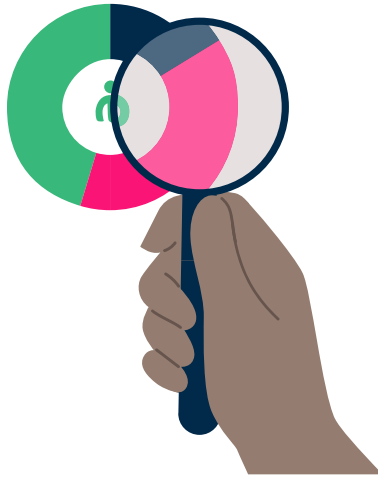
- **User training options (on-site, virtual, self-paced)**
- **Admin training**
- **Onboarding, including new members of staff**

Support:

- **Support hours and response times**
- **Support channels (email, chat, phone)**
- **Availability of dedicated account managers**

Example

**“24/7 customer support with extensive online training resources.”**



## 5. Request pricing and cost structure

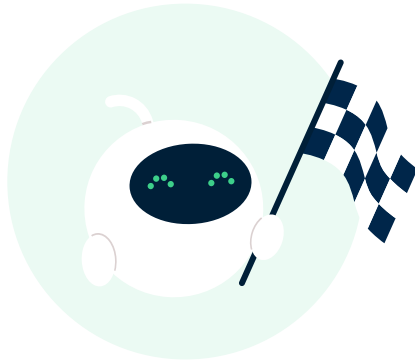
Have a clear idea of your budget and ask vendors to propose a detailed, transparent price structure.

Including:

- **Licensing models (per user, per feature, etc.)**
- **Setup/implementation fees**
- **Training costs**
- **Ongoing support and maintenance**
- **Optional features or modules**

Example

**“Request clear pricing for both setup and ongoing licensing costs.”**



## 6. Create a vendor evaluation framework

Outline how proposals will be evaluated.

Example criteria:

- **Usability**
- **Fit with functional and technical requirements**
- **Implementation plan**
- **Vendor reputation, experience and financial viability**
- **Pricing and total cost**
- **Support and training**

Example

**“We will evaluate CRM systems based on ease of use, total cost of ownership, and user feedback from similar businesses.”**

# Example of a scoring mechanism for vendors

Each proposal will be evaluated based on the following weighted criteria. Vendors will be scored on a 0–5 scale for each criterion, where:

**0 = Not addressed / Unacceptable**

**1 = Poor / Significant deficiencies**

**2 = Fair / Some deficiencies**

**3 = Good / Meets requirements**

**4 = Very Good / Slightly exceeds requirements**

**5 = Excellent / Fully meets or exceeds requirements with added value**



Category	Weight	Description
Usability	15%	User experience, interface, accessibility and adaptability of the CRM interface
Fit with functional and technical requirements	25%	Degree to which the proposed CRM meets business and technical requirements
Implementation plan	15%	Quality and realism of the implementation plan, training and support
Vendor reputation, experience and financial viability	10%	Proven experience, case studies, client references and financial health
Pricing & total cost	20%	Total cost of ownership including licensing, implementation and ongoing costs
Support and training	15%	Post-implementation support model, helpdesk services, onboarding, user training, documentation



# Final checklist

**Before you send your RFP, make sure:**

- **All stakeholders have reviewed it**
- **Your requirements are clearly defined**
- **You've included measurable evaluation criteria**
- **You're ready to compare vendors**

**Are you ready to make  
the right choice?**

**Our sales team are here to help**

