



## **Customer Relationship Management (CRM) Consideration Check-list**

Specific program features

Vendor track record:

- Maintenance/service
- Reliability statistics
- Upgrades

Target market:

Good for small business? Experience with healthcare organizations?

Flexibility/customization

On-demand/remote:

- Palms
- Laptops
- Real-time/sync

Hosting:

Web or on-site?

Integration capability:

- Other systems
- Microsoft office – Word? Excel? Outlook

Data import: process and responsibility

Licensing parameters

Users:

- Training
- Curtaining
- Access

Dashboard features

Reporting

Issue Resolution Management

*Effective healthcare business development.*

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