



Lasa CRM Scorecard



Creative Commons License - This work is licensed under a Attribution-NonCommercial-ShareAlike 2.0 UK:England & Wales License.

Criteria: (0 = non-existent or poor, 3 = average and 5 = exceeds standard expectation)

CRITERIA	CRM 1	CRM 2	CRM 3	Notes
Platform Cost and Details				
Licensing: open source or proprietary?				
Licence costs per user?				
Development, installation, maintenance costs?				
Annual support fees? (per user?)				
Version upgrade costs?				
Any other costs? (Read the small print)				
Platform Independent (PC, Mac, Linux)				
Mobile device access?				
Hosted online in UK/EU?				
Able to self-host?				
Platform Technology				

Database technology (MySQL, PostgreSQL, Microsoft SQL, Oracle, IBM DB2, Access, etc)				
Is the CRM extendable through additional modules?				
Does it support integration with third party APIs?				
Standards supported (XML, DTDs, HTML, XSLT)				
Cross-browser support? (which browsers?)				
Able to import and export data in common formats? (CSV, XML, etc)				
Ability to move between proprietary CRM products?				
Database features				
Contact management				
Tracking sales and marketing				
Document management				
E-commerce				
Integration with CMS (Drupal, Joomla, etc)				
Integration with financial software (Sage, Quickbooks, etc)				
Campaign management				
De-duplication/contact merging				
Social/community integration				
Case/helpline management				
Event admin				
Grant management				
Impact monitoring/statistical reporting				
Workflow customisation				
Mass Mailer/mail merge				
Membership admin				
Project management				

Time management				
Donation management				
End user experience				
Learning Curve/Ease of use				
Accessibility				
Templates/skins				
Effective navigation				
Personalisation				
WYSIWYG Editing				
Auto-completion				
Administration and Security				
Reporting tools - customisable				
Permission allocation for users				
Organisational branding				
Data back-up and export				
Two Factor Authentication				
UK Data protection compliance				
Customer service and support				
Training				
Documentation				
Knowledgebase/FAQs				
Helpline/email support (24/7?)				
Remote support				
Developer/Community product support				
Vendor profile				
HQ location				
Turnover				

Number of customers				
References and reference sites?				
How long established?				
CRM SCORE				