

# CRM Checklist

Your guide through the most important questions when making your CRM decision.

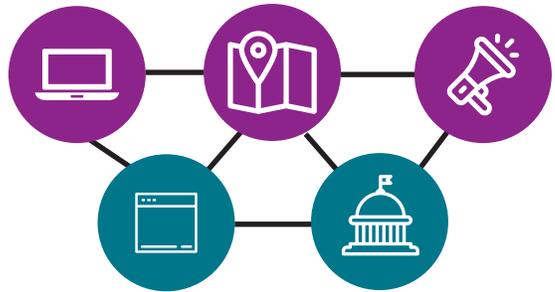
As you begin your transition into office and start making the crucial technology decisions that will affect your entire staff, rather than siloing each separate communications channel, **select a secure, adaptable and fully integrated CRM that puts every communication at your fingertips.**

## Integration with Other Technology Services

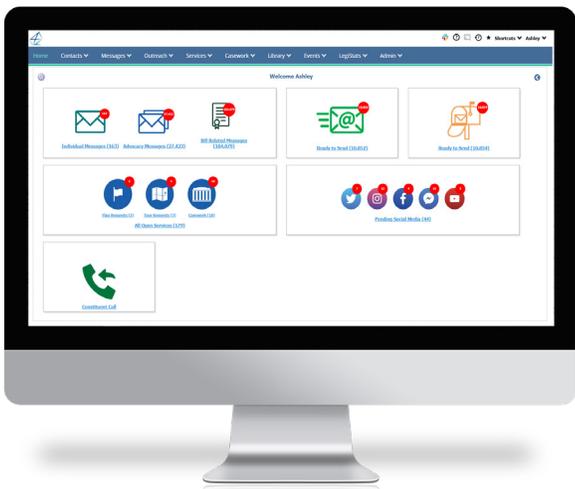
- Does the system integrate with my social media channels or Eventbrite?
- Does the system sync with Outlook?
- Does the system include internal collaboration & discussion tools?
- Does the system come with integrated casework & constituent service request tracking?
- Is eNewsletter functionality included at no additional cost or is there an additional fee?
- Does the vendor offer other communications solutions like telephone town halls, web design & voter data?
- Does the system integrate with any of the vendor's other communication solutions?
- Does the vendor offer support plans for my office's IT assets?

## Automation Functionality

- Does the system suggest automated email responses based on subject and common language?
- Does the system use machine learning concepts to track legislative matters and tie bill language to incoming mail?



## Check every box with IQ & our House IT Support Plan!



Whether it's email, social media, a phone call, postal mail or even an in-person office visit, **IQ empowers real, meaningful engagement** with your constituents within a single interface.

## One CRM for the Whole Office

- Does the system have tools my whole staff can use?
- Does the vendor offer unlimited user accounts?
- Can I use this system to route documents for approval?
- Does the system run off a single integrated database?

## Flexible and Adaptable

- Is the system accessible via mobile devices?
- Can I customize responses to incoming correspondence?
- Can I customize the interface based on job duties?

## Contact us!

Contact us today to learn if your office is inheriting IQ or our House IT Support plan (HITS). If you'd like to schedule a demo or ask any questions about selecting the right CRM for your office, email our team at [house.sales@leidos.com](mailto:house.sales@leidos.com).