How to Pick the Perfect CRM for Your Office

Picking a Constituent Relationship Management (CRM) tool for your office is a difficult decision—and an important one. As the leading CRM in the public sector, we know exactly what Congressional offices need to serve their constituents efficiently and effectively. That's why we've put together this cheat sheet for offices choosing a new CRM. Based on our 30 years of experience, these are the questions you should be asking a potential provider to find the perfect product for your office.

Full Functionality

- Will your office(s) be able to manage and respond to the large amount of constituent mail you receive in a day?
- Can you send outreach, such as newsletters, surveys, or press releases?
- Will the CRM be capable of tracking constituent service requests, including House-specific requests such as tour requests, flag requests, academy nominations, and grant management?
- Will your office be able to manage multiple calendars from within your CRM?
- Is there a place to log phone calls, office visits, meeting notes, and opinions in your CRM?
- Can the CRM separate individual constituent messages from advocacy campaign mail?

Ease of Implementation

- Is there a clear plan for implementing the product in your office?
- What is the timeline for implementation?
- Who will be there to help you through the process?

Training

- What training opportunities are available to you and your staff?
- Is training done in person, on site, or remotely?
- Are there virtual learning tools, such as elearning videos, that your staff can access at any time?
- Is training standardized or customized to the priorities of your office?
- Is there one general training program for all staff or are there specialized training opportunities for different roles?

Customer Support

- Will your staff be able to get help with the product after the implementation process is over?
- How will you contact the help team (e.g., via phone, email, or online chat)?
- Will you be able to get on-site support if needed?
- When will support be available?
- What is the support process for emergencies and time-sensitive issues?
- Is there any additional cost for ongoing support?

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Integrations

- Does the CRM in question integrate with any platforms or tools that might be helpful to your office, such as Eventbrite, Microsoft Outlook, Facebook, Twitter, Instagram, or YouTube?
- Does the CRM currently partner and/or integrate with a data provider to allow you to easily upload your data?
- Will you be able to view and respond to social media messages within your CRM?
- When you hold an event, will it be easy to upload the list of attendees into your CRM to send reminders and follow-up emails?
- Are there any plans for future integrations with your CRM?
- Can users create web forms in your CRM and post them to your website so that responses flow securely into your CRM?

Reports & Analytics

- Does the CRM track analytics on staff activity, constituent services, and outreach?
- What kinds of reports can staff members run and how are they displayed?
- Can reports be customized to fit the needs of each office?

Security

- What security measures are put in place to prevent security issues?
- What is the company's track record with security?
- Is there a contingency plan in place if the product's security is compromised?
- Can admin grant or restrict permission to certain functionalities of the CRM for each staff member?
- Can the CRM be configured so that some users require approval for certain actions?

We know that every office is different. Feel free to tailor this cheat sheet to fit your office's needs, so that you can get the best product for you and your staff.

Choosing a new CRM can be an overwhelming process. **Let us help you out.**

Schedule a call with our team of experts to talk about the best solution for your office.

Looking for more advice? Check out our blog by going to intranetquorum.com/news

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