

CRM Requirements

Requirement	Must Have	Nice-to-Have	Notes	Rating + Score
Contact Management- Ability to create employer profiles with details (address, sector, website, phone, # of employees, etc)				
Lead Management- Ability to input and track employees associated with organizations (with their contact info)				
Tasks/Follow Up				
Email Tracking				
Meeting/Appointment Tracking				
Call Tracking				
Activity tracking (WBL, etc.)				
Campaign Management				
Reports				
Dashboards				
Mobile App				
Internet Based (Remote Access)				
Ease of Use				
Data Share (both directions) with current system(s)				
Send Alerts				
MS Outlook Integration				
Ability to control/limit access to certain fields or users				
Customizable				
Ability to move employers through a sales process				
Open fields for notes				

