

CRM Checklist

Use this checklist to guide you through the most important questions when making your CRM decision.

Integration with Other Technologies and Services

- Does the system integrate with my social media channels or Eventbrite?
- Does the system sync with Outlook?
- Does the system include internal collaboration and discussion tools?
- Does the system come with integrated casework and 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 and voter data?
- Does the system integrate with any of the vendor's other communications solutions?
- Does the vendor offer support plans for my office's IT assets?

Check every box with IQ and our House IT Support plan!

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 the system to route documents for approval?
- Does the system run off of 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?

As you begin your transition into office and start making the crucial technology decisions that will affect your entire staff, don't make the mistake of siloing each separate communications channel. Select a secure, adaptable and fully integrated CRM that puts every communication channel at your fingertips. 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.

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, please contact us.

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