

CRM Software Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Think about the CRM named above during the stated two-workweek period. Answer from your own work experience and select the not-used options where needed. Every question is optional. Do not include customer details, login information or confidential records.

1. During this period, on how many workdays did you use the CRM?

- ☐ None
- ☐ 1–2 days
- ☐ 3–5 days
- ☐ 6–8 days
- ☐ 9–10 days
- ☐ I do not remember

2. How easy was it to find the customer record you needed?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither easy nor difficult
- ☐ Somewhat easy
- ☐ Very easy
- ☐ I did not try this

3. How easy was it to record the latest customer interaction?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither easy nor difficult
- ☐ Somewhat easy
- ☐ Very easy
- ☐ I did not try this

CRM Software Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

4. How often did missing or outdated information interrupt your CRM work?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Always
- ☐ I did not use the CRM

5. When work passed between people, how clear was the next action in the CRM?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ I did not use the CRM for a handoff

6. Which change would help your CRM work most?

- ☐ Access to the right records
- ☐ Clearer instructions
- ☐ More accurate information
- ☐ Fewer duplicate steps
- ☐ Clearer responsibility for follow-up
- ☐ More timely support
- ☐ Another change
- ☐ No change needed
- ☐ Not sure

CRM Software Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

7. Describe one task that would benefit from the change you selected.
