Printable first-week CRM trial checklist

How to Evaluate a Dealership CRM in the First Week With Real Leads and Two Roles

Owner: _____ Date: _____

- [ ] Import a small sample of real leads and verify that names, contact details, source fields, and notes appear correctly after migration.
- [ ] Assign those leads to two real roles, then confirm that ownership is obvious to the salesperson and visible to the manager.
- [ ] Create or review a simple follow-up step for each lead and check that the next action is easy to find inside the record.
- [ ] Use built-in tutorials and Help Center guides during the trial and note whether staff can revisit the same instructions without outside help.
- [ ] Ask the vendor to identify every implementation cost in the quote, including setup, migration assistance, user setup, and onboarding support.
- [ ] Record which steps caused confusion so you can judge whether the workflow is clear enough for daily use after go-live.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee