CRM and Web Tools Survey

Created by The Campaign Workshop.

Please make edits and adjustments to the following survey as you see fit. We suggest using a program like Survey Monkey to compile the results.

If you have questions regarding the survey, please feel free to email us at: info@thecampaignworkshop.com

The following survey is designed to gather information about what our team likes and what could be improved with our existing CRM and web tools that we use for compliance, membership and advocacy. Our current CRM vendors are FILL IN THE BLANK.

Please fill out and complete the survey by INSERT DATE.

1. What do you think of our current web tools for membership, advocacy and compliance?

A.   I love them
B.   They are pretty good
C.   I like them sometimes
D.   I am ambivalent
E.   They frustrate me sometimes
F.   They are the bane of my existence.

2. How do you like our current CRM system?

A.   I love it
B.   It is pretty good
C.   I like it sometimes
D.   I am ambivalent
E.   It frustrates me sometimes
F.   It is the bane of my existence

3. If we could change something about our CRM, what would it be?

A.   The integration between tools
B.   The advocacy tools
C.   The system to select data
D.   The accounting system
E.   The PAC and finance modules
F.   Other

4. If we could keep one thing about our current CRM, it would be:

A.   The integration between tools
B.   The advocacy tools
C.   The system to select data
D.   The accounting system
E.   The PAC and finance models
F.   Other

5. If it were up to me, we would:

a.   Keep our current CRM
b.   Make updates and tweaks to our current CRM
c.   Change some parts of our current CRM
d.   Change most of our current CRM
e.   Scrap our current CRM and start off with a brand new system

6. The reason we have kept our current CRM is because:

a.   It works great
b.   It meets our core needs
c.   It is the best that we can afford
d.   It is too expensive to switch
e.   The internal politics to make a switch are too difficult.
f.   It just takes too much time to switch

My name is FILL IN THE BLANK.