

Twelve questions to ask a CRM about its AI.

A vendor-neutral checklist for a 1 to 50 person team that has been pitched at least three AI-CRMs this quarter.

PRINT ONE PAGE. PIN IT NEXT TO THE DEMO CALENDAR.

[INSIDE] THE 12 QUESTIONS

[01]

MEASURABLE OUTCOME

[02]

OPT-OUT

[03]

DATA SHAPE FIT

[04]

BOLT-ON OR NATIVE

[05]

DATA RESIDENCY

[06]

PROMPT OR DETERMINISM

[07]

PRICING CHANGE AT GA

[08]

WHO OWNS THE OUTPUT

[09]

FALLBACK WHEN WRONG

[10]

HUMAN IN THE LOOP

[11]

EVALUATION METHOD

[12]

EXIT COST

[01] MEASURABLE OUTCOME

What specific number does this feature change, and by how much?

[GOOD ANSWER]

A named metric (response time, qualified lead rate, contact data completeness) with a number and a baseline.

[RED FLAG]

It saves time, or the team will love it. No metric, no baseline, no after.

[02] OPT-OUT

Can I turn this feature off without losing the rest of the CRM?

[GOOD ANSWER]

A toggle at workspace or per user level. The table, pipeline, and import stay the same.

[RED FLAG]

The AI is the UX. Disable it, and the screens you actually use stop working the same way.

[03] DATA SHAPE FIT

Will it work on my actual data, not your demo data?

[GOOD ANSWER]

The vendor runs the feature on a CSV you exported from your current tool, live in the demo.

[RED FLAG]

Demo only on the vendor's seeded sample. Your data will work the same way, trust us.

[04] BOLT-ON OR NATIVE

Is this a panel I open, or part of the screens I already use?

[GOOD ANSWER]

The feature lives inside the table, the row, and the board you already touch every day.

[RED FLAG]

A second product. A separate AI assistant tab. A chat sidebar grafted onto the CRM.

[05] DATA RESIDENCY

+ Where does my data go when the AI feature runs?

[GOOD ANSWER]

A named region (EU, US) and a named subprocessor, listed in the DPA. Both in writing.

[RED FLAG]

We use industry standard providers. No region named, no subprocessor list shared.

[06] PROMPT OR DETERMINISM

Same record tomorrow, same answer?

[GOOD ANSWER]

Deterministic rules where it matters (scoring, dedupe). Generative only where a person reads the output.

[RED FLAG]

Generative output dressed as a calculation. A different answer every Tuesday.

[07] PRICING CHANGE AT GA

What does this feature cost today, and on the day it leaves beta?

[GOOD ANSWER]

A line item in the pricing page. A written commitment that today's free tier stays usable at GA.

[RED FLAG]

Free during beta with no GA price. Or, we will let you know closer to the date.

[08] WHO OWNS THE OUTPUT

The summary the AI writes into my record, is that mine?

[GOOD ANSWER]

AI generated content is yours. Exports with your data in CSV or JSON. Stays editable.

[RED FLAG]

AI output lives in a vendor side cache. The export drops it. Edits are limited or disabled.

[09] FALLBACK WHEN WRONG

What happens when the AI gets it wrong?

[GOOD ANSWER]

A clear undo path. The wrong record is editable like any other. A log of AI edits, by user.

[RED FLAG]

AI changes are silent. No log. No way to roll back a batch you did not realise had run.

[10] HUMAN IN THE LOOP

Does the AI act on its own, or does a person confirm first?

[GOOD ANSWER]

Draft state by default. The operator sees the AI suggestion before it touches the record.

[RED FLAG]

The AI updates records, scores deals, or sends messages with no confirmation step.

[11] EVALUATION METHOD

How will I know this feature improved my work in 60 days?

[GOOD ANSWER]

The vendor names a measurement plan. Before and after numbers from one real customer, with caveats.

[RED FLAG]

Testimonials only. A case study with no numbers. Customers love it. Trust the score.

[12] EXIT COST

If I cancel the AI tier, do I keep the records the AI created?

[GOOD ANSWER]

Cancel and the AI written fields, summaries, and tags stay in the export. Your data is yours.

[RED FLAG]

AI generated fields disappear from the export the moment you downgrade. Output was a rental.

[HOW TO READ THIS]

Twelve questions, vendor-neutral. Ask them in the demo, in the security review, and in the pricing call. The right answers are short and specific. The red flags are usually longer and friendlier.

Twelve questions. Vendor-neutral. Print, share, walk into the next demo.

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