

# CRM Comparison Matrix

Comparing CRM Tools for Contracting Use Cases

Not all CRMs are designed for contractors. This comparison highlights functional considerations, not endorsements, to help businesses evaluate tools based on contracting needs rather than sales features.

This resource is educational only and does not recommend or rank vendors.

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## Key Evaluation Criteria

<u>Capability Area</u>	<u>Why It Matters for Contractors</u>
Opportunity Tracking	Track bids, solicitations, and pipeline status
Document Management	Store and version compliance and proposal files
Deadline & Task Tracking	Prevent missed submissions and renewals
Custom Fields & Scoring	Support readiness tiers and bid/no-bid logic
Workflow Automation	Reduce manual follow-up and errors
User Permissions	Control access to sensitive data
Reporting & Dashboards	Provide visibility across bids and contracts
Integration Capability	Connect to portals, forms, or accounting tools

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## Common CRM Categories

<u>CRM Type</u>	<u>Strengths</u>	<u>Limitations</u>
General Sales CRMs	Flexible, widely adopted	Often sales-centric
Project-Based CRMs	Task and milestone focus	Limited pipeline logic
All-in-One Platforms	Portals and workflows	May require customization
Contracting-Focused Systems	Built for compliance	Fewer vendor options

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## Key Takeaway

The “best” CRM is the one that supports your contracting workflow, not the one with the most features.

**Note:** This guide does not evaluate pricing, security, or legal compliance.