The Ultimate Pay-for-Lead CRM Evaluation Checklist

Use this checklist to compare CRM platforms and ensure you're choosing the right solution to scale your pay-for-lead operation. Think carefully about which criteria are must-have, nice-to-have or not needed.

	Criteria	Tool 1:	Tool 2:	Tool 3:	Tool 4:
Lead Management and Attribution	Tracks lead source, campaign, and UTM parameters automatically				
	Supports multi-touch attribution				
	Allows custom lead tags or categories				
	Integrates with affiliate networks and third-party lead providers				
Smart Lead Routing	Automates lead distribution by vertical, price, geo, or buyer status				
	Supports round-robin, priority, or ping-post routing logic				
	Allows buyer-specific filters and delivery caps				
	Provides routing logs and error tracking				
Lead Scoring and Validation	Real-time deduplication to prevent duplicates across campaigns				
	Email, phone, and IP validation built-in or via third-party integrations				
	Configurable lead scoring rules based on custom criteria				
	Flagging of invalid, incomplete, or low-quality leads				
Advert Platform and Channel Integrations	Native integration with Facebook Lead Ads, Google Ads, TikTok				
	Webhooks or API for affiliate/postback connections				
	Instant lead ingestion from paid channels (no delays)				
	Ability to push conversion data back for ad optimization (offline events, etc.)				

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Performance Tracking and Dashboards	Real-time dashboards with CPL, ROI, and conversion metrics				
	Custom report builder for campaign or buyer-specific KPIs				
	Buyer performance insights (close rate, refund rate, etc.)				
	Scheduled report exports or live links for partners/stakeholders				
Compliance and Consent Management	Built-in TCPA/GDPR/CCPA consent capture (timestamp, IP, etc.)				
	Secure storage of opt-in data for audits				
	DNC list and suppression list support				
	Automated consent logs and retrieval tools				
Scalability and Support	Can handle high lead volume without performance lag				
	Uptime SLA or reliability guarantees				
	Onboarding support or migration assistance				
	Access to technical support or a dedicated success manager				
Pricing and Flexibility	Transparent pricing (per lead, per seat, per feature)				
	No long-term contracts or lock-ins				
	Pay-as-you-grow options for early-stage or scaling teams				
	Flexible APIs for custom workflows				

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