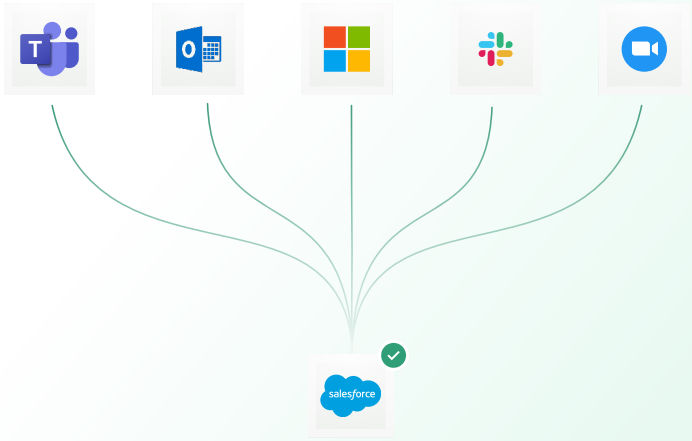
Revenue Grid

10 Questions to Ask Your Next *Activity Capture Solution*



Choosing an activity capture solution isn't just about syncing emails — it's about ensuring your CRM is complete, accurate, and actually usable by your revenue team.

The wrong solution can quietly introduce data gaps, clutter, and compliance risks. The right one becomes a foundation for relationship insights, pipeline visibility and customer growth.

Before you decide, ask these 10 critical questions:

1. Can I control what gets captured — and what doesn't?

Not every email belongs in CRM. Without control, you end up with cluttered data, irrelevant activities, and potential exposure of sensitive information.

2. How do you prevent CRM data from becoming cluttered with irrelevant activity?

Duplicate email threads and unnecessary content quickly degrade CRM usability. Clean, structured data is essential for team productivity, reporting accuracy, and system performance.

3. How do you capture full email conversations?

Sales conversations happen in threads, not isolated emails. If conversations aren't captured consistently, you end up with incomplete records and broken customer context.

4. How do you handle email attachments?

Attachments often contain the most important information — proposals, contracts, and presentations. If they aren't stored properly in Salesforce, your team loses access to key deal context.

5. How much historical email data can you actually access?

Sales cycles, renewals, and customer relationships often span years, not months. If you can't access historical conversations, you lose critical context that could have been used to engage customers more personally and relevantly.

6. Will all of my team's communication actually be captured?

Reps often use multiple email addresses or aliases. Gaps in capture lead to missing activity, inaccurate reporting, and lost visibility into customer engagement.

7. Does it work beyond just internal sales teams?

Revenue generation involves partners, customers, and cross-functional teams. If they're excluded, your CRM only tells part of the story.

8. Can the solution adapt to my Salesforce data model?

Most Salesforce orgs rely heavily on custom objects. If your activity capture tool can't support them natively, you'll face limitations, workarounds, and added admin overhead.

9. How much ongoing admin effort is required to keep this working?

Revenue generation involves partners, customers, and cross-functional teams. If they're excluded, your CRM only tells part of the story.

10. Is the solution built for enterprise security and compliance needs?

Many organizations operate in regulated environments. Without the right controls, deployment options, and compliance support, you introduce risk to both your data and your business.

The Bottom Line

Activity capture should do more than automate logging — it should improve data quality, preserve complete customer context, and give you full control over your CRM.

If a provider can't clearly answer these questions, it's a sign to dig deeper.