

Is Your CRM Actually Built for Google Workspace?

12 questions to ask before you hand over your Gmail, Calendar, and sanity.

GMAIL INTEGRATION

- 1 Does it sync emails automatically, or do I have to do it manually?
Manual logging = it won't happen. Period. YES NO
- 2 Will I see CRM context inside Gmail, or do I have to switch tabs?
Bouncing between apps kills your flow. YES NO
- 3 Can I log emails to a deal or contact with one click?
If it takes three steps, no one will bother. YES NO
- 4 Does it track email opens and clicks automatically?
Knowing who's reading your follow-ups is gold. YES NO

GOOGLE CALENDAR & CONTACTS

- 5 Do Calendar events sync to the CRM and back again?
One-way sync is just a fancier spreadsheet. YES NO
- 6 Does it sync Google Contacts without creating duplicates?
Duplicate contacts are a nightmare you don't want. YES NO
- 7 Can I set follow-up reminders that show up in my Google Calendar?
Your CRM tasks should live where you already work. YES NO

WORKFLOW & AUTOMATION

- 8 Can it send automated email sequences straight from Gmail?
Drip campaigns shouldn't need a separate tool. YES NO
- 9 Is there an AI assistant to help write emails faster?
Because AI's grammar is better than most. YES NO
- 10 Can I customise deal stages to match how my team actually sells?
Your pipeline shouldn't be forced into someone else's template. YES NO

THE PRACTICAL STUFF

- 11 Does the mobile app work offline and sync when I'm back online?
Sales happens away from desks. Your CRM should be able to keep up. YES NO
- 12 Can we be up and running in under a week, data included?
If setup takes months, that's a red flag. YES NO

PIPELINE CRM + GOOGLE WORKSPACE

Every box on this list? We check them all.

Native Gmail sync, Calendar, Contacts, AI email assistant, all included.

See it live with your Gmail.

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