CRM Checklist

A checklist for setting up and maintaining a CRM with clean data, clear stages, automation and adoption.

Data Fields and Structure

- ◯ Define the core objects you track — leads, contacts, accounts and deals.
- ◯ Choose required fields and keep them minimal to protect adoption.
  Every required field is a tax on the rep entering it.
- ◯ Standardize picklists for industry, source, status and region.
- ◯ Set naming conventions for accounts, deals and records.
- ◯ Document what each field means and who owns it.

Data Hygiene

- ◯ Import existing data and map every field to the right place.
- ◯ Find and merge duplicate contacts and accounts.
- ◯ Fill or flag records with missing critical information.
- ◯ Archive or update stale records on a regular cadence.
  Schedule a recurring cleanup so decay never piles up.
- ◯ Set validation rules to keep new entries consistent.

Pipeline Stages

- ◯ Define pipeline stages that match how deals actually progress.
- ◯ Write clear exit criteria for moving a deal to the next stage.
- ◯ Set default probabilities and expected close dates per stage.
- ◯ Define what counts as won, lost and disqualified.
- ◯ Confirm the whole team agrees on stage definitions.
  Shared definitions make the forecast trustworthy.

Contacts and Relationships

- ◯ Link contacts to the correct accounts and deals.
- ◯ Capture roles, decision-makers and relationship strength.
- ◯ Log key activities — calls, emails and meetings — consistently.
- ◯ Record communication preferences and consent where required.
- ◯ Keep a single source of truth so no contact is duplicated.

Automation and Integrations

- ◯ Connect email, calendar and marketing tools to the CRM.
- ◯ Automate data capture to reduce manual entry for reps.
- ◯ Set up lead routing and assignment rules.
- ◯ Create task reminders and follow-up triggers for each stage.
- ◯ Test every workflow before rolling it out to the team.
  One broken automation can quietly corrupt data for weeks.

Reporting and Adoption

- ◯ Build dashboards for pipeline, forecast and activity.
- ◯ Define the metrics leadership reviews and how often.
- ◯ Train the team on the agreed process and why it matters.

- [ ] Monitor adoption and coach reps who fall behind on data entry.
- [ ] Review the CRM setup periodically and refine fields and stages.

  Treat the CRM as a living system, not a one-time setup.