CRM Coach (https://crm.coach/)

17-Point CRM Checklist

Get better results from your team through driving CRM adoption. You will spend less time sifting through chaos and more time selling and improving customer relationships. And your team can stop asking themselves what they should do next, and start doing what they need to do.

This checklist outlines all major steps that you need to for a successful CRM implementation. Follow the checklist below to help guide you through setup and onboarding. You might find it helpful to print this checklist so that you can refer to it throughout the process.

All of your opportunities in one place

Company Setup 101

◻ Company-Wide Settings

The goal of a CRM is to manage all of your sales activities from a single tool. This means defining a consistent sales process (pipeline) and defining the minimum expected fields. When everyone is clear on what data is needed, and there is a reporting feedback loop then sales reps and effectively filter their leads and opportunities, and leaders can coach and forecast accurately. Settings include:

- ▻ Team User Permissions
- ▻ Custom Fields / Record Customization
- ▻ Tags / List Segmentation
- ▻ Deal Required Fields
- ▻ Company Required Fields
- ▻ Contacts Required Fields

◻ Structure Defined: CRM Matches Your Sales Process

One of the biggest struggles teams have with a sales process is not clearly defining the essential deal stages. When every stage has clearly defined 'exit criteria' it helps the reps both disqualify to keep a clean pipeline and stay clear on what the next step is to close the deal. It also helps leadership avoid asking "how is XYZ deal going" and be able to predict the future.

The core of your CRM structure is based on A) **Stages** (the steps in your sales process) and B) **Pipelines** (collection of stages for one sales process)

◻ Existing Data Sources Imported: All Your Data in One Place

Wherever practical, data sources (spreadsheets especially) not kept in the CRM should be analyzed for transferability. Generally, data can be exported, cleaned up, and imported using a CSV file. It is important to organize your existing data before importing it: combine duplicates, delete junk records, and replace old records with new data.

When all your team's opportunities are in one place and updated daily, you will derive maximum benefit from your CRM initiative. It must become the single source of truth whenever possible.
When every interaction, service request, and past contact detail about every customer is instantly available, it will give you a much better chance to win new business.

◻ Data Organized and Kept Up-to-Date

Most organizations find it best to maintain the following categories, so contacts, companies, and opportunities can be easily filtered on the following:

- ▻ Leads / Prospects
- ▻ Lead Source
- ▻ Current Customers
- ▻ Past Customers
- ▻ Strategic Partners
- ▻ Deal Size
- ▻ Priority
- ▻ Next Step

All team member's accounts fully configured

Employee Setup 101

◻ Email Syncing

Each team member can easily sync their current email account(s) with into most modern CRMs, including Pipedrive and Hubspot. Supported email services typically include Google Mail (Gmail), Microsoft Office 365, and any IMAP accounts.

◻ Calendar Syncing

After syncing, emails exchanged will be pulled into the CRM and associated with contacts based on their email addresses. You will be able to look at a specific deal or contact and see all emails associated with that deal or person at-a-glance.

Syncing your CRM events with your calendar means events will show up in both your calendar and CRM. This also allows your team to organize and send calendar invites directly from the CRM.

Appointments created in either automatically sync to the other. This means you can always see your up-to-date schedule, no matter whether you're looking at your email calendar or you're working in the CRM.

◻ Setup Notifications

Each individual should deliberately select notifications will help them be more effective and responsive, including:

- ▻ Email opens
- ▻ Website visits
- ▻ Updates on Deals you are working

Consider your CRM a sales assistant, guiding you toward the next most important action to reach your goals.

◻ New Hire Onboarding Defined

A new hire checklist help standardize the onboarding process so new talent can start contributing more quickly. Customize the checklist to include any team-specific meetings, training, or reminders. Remember, it isn't only sales reps that will need CRM onboarding. We recommend every new hire complete the official training course provided by the CRM itself. For example, see the Sales Software (https://academy.hubspot.com/courses/hubspot-sales-software) course provided by Hubspot or the Getting started with the basics (https://www.pipedrive.com/en/academy/courses/get-started-with-the-basics) course provided by Pipedrive.

The purpose is to help new employees understand how to easily use the CRM as a tool to reach their personal goals and is not 'big brother.'

Pipeline and relationships updated daily

Deals

☐ All Deals Up-to-date With Correct Stage

At all times, every Deal (Opportunity or Project) should be in the right stage.

When all your team's opportunities are in one place and updated daily, you know which Deals require the most attention (by default the ones closest to closing). Deals are a great way to keep track of how you are turning prospects into customers and how much money you are making over time.

☐ All Active Deals Have a Next Step

A clear next step means a description of what needs to come next, along with a deadline. Your CRM has a task/activity management system – use it.

When all deals have the next step clearly defined, salespeople are able to relax their psyche leading them to clearer decision-making and greater creativity. Sales is knowledge work, requiring a continual investment in transforming a flood of often chaotic "inputs" into next actions. A trusted list of next actions, put in context, relieves the brain of the work of remembering and reminding, reducing missteps with customers.

Scheduling follow-ups and defining next steps ensures opportunities to close deals or grow customer accounts won't be missed. It is all too easy to forget details or for a meeting or phone conversation not to be followed up on as promised.

Build dashboards and track performance

Reporting and Pipeline Management

☐ Define Key Reports

When all your team's opportunities are in one place and updated daily, you'll have access to real-time metrics.

As you fine-tune your reports, consider the following:

▻ **Who** will be using it (individual reps, executive team, etc)
▻ **How** they'll use it: Are they checking the dashboard daily, weekly, monthly, etc?
▻ **What** information they'll want to see: Which metrics, visualizations, and calculations are most important for that audience?

With reports directly in CRM, you'll reduce logging into so many apps to understand sales performance — share reports, monitor trends, and discover insights.

☐ Visualize Goals in Real Time

Track your team's performance based on both leading and lagging indicators. Tracking behavior may include things like dials, emails sent, appointments set, and/or proposals sent. Your CRM can also show how your team is tracking towards quota attainment.

Does your team know what is expected?

Define Expectations

☐ Up-to-Date Minimum Expectations

Set minimum expectations for useful, actionable insight to transform your business.

▻ What needs to be logged? Which fields are required?
▻ What is the exit criteria to move a deal through the pipeline (when is a stage complete)?
▻ Daily behavior expectations

This helps mitigate the impact of turnover. If an individual with key customer information were to leave, then their knowledge could walk out the door without a trace.

CRM expectations should be as simple as possible but will still help everyone easily access the latest information.

☐ Lead Routing Process

A clear process for lead assignment using the CRM will ensure status is automatically tracked and opportunities and worked in a timely manner. Whether your process is based on a series of qualification steps, territory, zip code, industry, size, round-robin, or lead score your CRM can help you get and stay organized. Also, get clear on what point a lead is contacted by sales. Where is the handoff?

Guide your team

Prospecting Cadence

☐ Routines Defined

Your team members are best when they do one thing at a time. Being able to let go is a result of having a process. Many reps find choosing which leads or prospects to focus on to be guesswork rather than a streamlined process based on data.

For those on your team responsible for hunting new business, they need to easily be able to see who to call next. If you have 100 leads, how do you know who to call next? For your business, decide on whether it makes sense to rank by either lead score, temperature (cold, warm, hot), priority, or by tier.

Failure of team members hitting quota is often a result of not having clarity on what is most important and what the next step is. One way to unlock productivity is to put together a prospecting sequence (sometimes called a “cadence”) where the CRM guides your team through a routine to generate new leads or appointments.

Reduce manual inputs

Process Automation

☐ Automate Manual Inputs

Process automation frees up your people from mundane manual inputs so they can focus on adding strategic value. Common automations include:

▻ Creating tasks when a deal hits a certain stage
▻ Email notifications to customers based on stage
▻ Proposal details (e.g. Company Name) pulled from the CRM

By establishing winning processes you can reduce human error by letting your CRM handle important yet otherwise easily forgettable tasks.

☐ Advanced Integrations

Get your CRM to talk to other tools used by your organization to increase collaboration and decrease mistakes and manual entry. Examples include:

▻ Accounting / Finance (such as Netsuite, Quickbooks, Stripe, PayPal, etc.)
▻ Marketing Tools (Site tracking, landing pages, marketing/email automation)
▻ Digital signature tools (Docusign, Pandadoc, etc.)

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