

# CRM Checklist

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- Identifying Stakeholders
  - Identify all those who will be affected in some way by the implementation of a CRM solution.
  - Make sure everyone involved understands what CRM is.
  - Make sure everyone involved is well aware of CRM potential impact.
  - Make sure everyone involved has an opportunity to provide input into the project.
- Objectives
  - Know exactly what you're trying to accomplish with your CRM project.
  - Make sure you've set objectives that are specific, measurable, attainable, realistic, and tangible (SMART).
- Planning
  - Put a person or small group of people in charge of your entire initiative.
  - Identify customer-facing activities that need to be restructured.
  - Make any needed corrections to the way they are coordinated.
  - Map out and test your new workflow before you purchase and deploy your new CRM solution.
  - Structure your budget to account for the initial purchase price and ongoing costs for maintenance and system improvements.
  - Plan for the recurring monthly fees.
  - Have a clear performance measurement strategy.
  - Determine what your key metrics and performance indicators will be.
  - Determine who will be responsible for tracking the performance indicators.
  - Take immediate corrective action if you aren't reaching your goals.