CRM Checklist

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# Tasks:

☐ **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.**

☐ **Detemine who will be responsible for tracking the performance indicators.**

☐ **Take immediate corrective action if you aren't reaching your goals.**