CRM Checklist

By Campbell Rodriguez

- ☐ 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.