CRM Readiness Checklist

Make sure you've got all your ducks in a row before starting down your CRM journey.

First things first!

What are your pain points?

Put together a list of all the things in your business that are causing miscommunications, loss of revenue, and/or reduced productivity.

How will your CRM address these?

Whether it's through automation, better oversight, improved record keeping, or just general organisation, you need to have a picture in your mind of how you CRM is going to solve your pain points.

What output do you need?

Have an idea about email signatures, email templates, PDF templates, mail merge templates, and other customer facing output you will need.

What about reporting?

Similarly, when you need to report on should definitely be part of the investigation stage. You don't want to get all your data into a system only to find you can't get it out.

THE INS AND OUTS

What does the data look like?

Knowing what kind of data you will be bringing into the system will help you identify the custom fields, layouts, and views you'll need.

INTEGRATIONS

Emails and Calendars

The ability to sync emails and tasks is our most popular integration. Keeps a full history of correspondence and you always know where you're supposed to be.

Accounting

Sending invoices and balances back and forth can be a great way to keep the right people up to date.

Anything else?

Do you have other systems you want to talk with your CRM? Whether it's a well known system, a small player, or a bespoke tool, see if you can find out the best way to bring data from there to your CRM.

YOUR TEAM

Who will use this new system?

Before you can know exactly how the system will operate, you will need to know who is going to use it. You might put together a list by department or individual, whichever is best for you.

Do you need to restrict access?

Whether it's about restricting access to an area of the system or just certain fields, think about who should be able to see (and edit, delete, or export) what.

Now that you've got your talking points, it's time to give your prospective providers a call to find out it they've got the CRM system to fit your business.

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