



CRM Contact Lifecycle Management Checklist 2026

Lead Capture & Entry Validation

Procedures for verifying data integrity, source tracking, and automated entry protocols for new prospects.

Lead Source Name

Lead Capture Channel

- ☐ Website Form
- ☐
- ☐ Social Media
- ☐ Cold Outreach
- ☐ Event/Webinar

Initial Contact Date

Data Validation Checkpoints Completed

- ☐ Email Format Verified
- ☐ Phone Number Validated
- ☐ Duplicate Check Performed
- ☐ Company Domain Verified

Entry Discrepancy Notes

Write something...

Lead Qualification & Scoring Setup

Steps to implement scoring criteria, MQL (Marketing Qualified Lead) to SQL (Sales Qualified Lead) handoff rules, and nurturing triggers.

Lead Scoring Model Type

- ☐ Explicit Scoring (Demographic)
- ☐ Implicit Scoring (Behavioral)
- ☐ Hybrid Model

Minimum Lead Score Threshold

Enter a number...

Required Qualification Criteria

- ☐ Job Title Verification
- ☐ Budget Confirmation
- ☐ Decision Maker Authority
- ☐ Timeline Alignment
- ☐ Technographic Fit

Scoring Logic Documentation

Write something...

Scoring Logic Review Date

Enter date...

Scoring Framework Reference Document

 Upload File

Contact Enrichment & Data Enrichment

Processes for augmenting contact records with third-party firmographic data and social profile integration.

Primary Enrichment Source

- ☐ LinkedIn Sales Navigator
- ☐ ZoomInfo
- ☐ Clearbit
- ☐ Manual Entry

Data Fields to Enrich

- ☐ Job Title
- ☐ Company Size
- ☐ Annual Revenue
- ☐ Industry/Vertical
- ☐ Technographics

Last Enrichment Audit Date

Enter date...

Enrichment Instructions

Write something...

Reference Source Documentation

 Upload File

Nurturing & Engagement Monitoring

Guidelines for tracking email engagement, content interaction, and automated drip campaign progression.

Monitored Engagement Channels

- ☐ Email Open/Click Activity
- ☐ Website Visit/Landing Page Interaction
- ☐ Content Downloads (Whitepapers/E-books)
- ☐ Webinar/Event Attendance
- ☐ Social Media Interaction

Current Nurture Track Status

- ☐ Initial Outreach
- ☐ Active Nurturing
- ☐ Re-engagement Attempt
- ☐ Paused/On Hold

Last Engagement Date

Enter date...

Engagement Score Threshold

Enter a number...

Nurture Strategy Notes

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Status Transition & Stage Conversion

Standardized workflows for moving contacts through the sales funnel and updating lifecycle stage triggers.

Current Lifecycle Stage

- ☐ Subscriber
- ☐ Lead
- ☐ Marketing Qualified Lead (MQL)
- ☐ Sales Qualified Lead (SQL)
- ☐ Opportunity
- ☐ Customer
- ☐ Evangelist
- ☐ Churned

Date of Stage Transition

Enter date...

Reason for Transition

Write something...

Required Verification Steps Completed

- ☐ Data Accuracy Verified
- ☐ Lead Scoring Updated
- ☐ Ownership Reassigned
- ☐ Follow-up Task Created

Transition Notes

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Customer Conversion & Onboarding

Post-sale transition steps to move contacts from 'Opportunity' to 'Active Customer' and handoff to Account Management.

Conversion Date

Onboarding Package Type

- ☐ Standard
- ☐ Premium
- ☐ Enterprise

Onboarding Tasks Completed

- ☐ Account Setup
- ☐ Initial Training Session
- ☐ Integration Verification
- ☐ Welcome Kit Sent

Onboarding Notes

Signed Service Agreement

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Account Manager Approval

Retention & Loyalty Tracking

Monitoring procedures for renewal dates, upsell opportunities, and customer health score updates.

Last Interaction Date

Customer Health Score

- ☐ Healthy
- ☐ At Risk
- ☐ Critical/Churn Risk

NPS (Net Promoter Score)

Active Loyalty Programs

- ☐ VIP Tier
- ☐ Subscription Member
- ☐ Referral Partner
- ☐ Beta Tester

Retention Risk Notes

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Churn Identification & Win-Back Protocols

Criteria for identifying inactive contacts and automated workflows for re-engagement campaigns.

Churn Risk Indicator

- ☐ Zero Engagement (30+ Days)
- ☐ Unsubscribed from Communications
- ☐ Failed Payment/Billing Issue
- ☐ Negative Support Ticket Trend
- ☐ Contract Expiration Imminent

Last Recorded Interaction Date

Enter date...

Win-Back Attempted Channels

- ☐ Email Campaign
- ☐ Direct Phone Call
- ☐ Retargeting Ads
- ☐ LinkedIn Outreach
- ☐ Physical Mailer

Churn Reason Analysis

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Estimated Recovery Value

Enter a number...

Data Hygiene & Lifecycle Cleanup

Regular maintenance tasks for archiving stale contacts, merging duplicates, and managing opt-out/unsubscribe lists.

Last Audit Completion Date

Enter date...

Cleanup Method Used

- ☐ Manual Review
- ☐ Automated Script
- ☐ Third-party Enrichment Tool

Data Types Cleaned

- ☐ Duplicate Records
- ☐ Invalid Email Formats
- ☐ Inactive Leads
- ☐ Outdated Firmographics
- ☐ Incomplete Profiles

Total Records Processed

Enter a number...

Cleanup Summary & Anomalies Found

Write something...

Data Steward Approval

Performance Analytics & Lifecycle Reporting

Metrics for evaluating conversion rates between lifecycle stages and overall funnel velocity.

Reporting Period Start Date

Enter date...

Reporting Period End Date

Enter date...

Lead-to-Customer Conversion Rate (%)

Enter a number...

Average Lifecycle Velocity (Days)

Enter a number...

Primary KPI Focus

- ☐ Conversion Rate
- ☐ Churn Rate
- ☐ Pipeline Velocity
- ☐ Customer Acquisition Cost (CAC)

Analyzed Lifecycle Stages

- ☐ Lead
- ☐ MQL
- ☐ SQL
- ☐ Opportunity
- ☐ Customer

Key Performance Insights & Observations

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Detailed Analytics Report Attachment

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🏁 Finish

🔧 Generate Sample Report