

CRM Customization Checklist

Requirements Gathering & Planning

Define the scope of customization and align with business needs.

Business Objectives for Customization

Write something...

Customization Priority (High, Medium, Low)

- ☐ High
- ☐ Medium
- ☐ Low

Estimated Effort (in hours)

Enter a number...

Dependencies on Other Systems/Processes

Write something...