

# CRM Governance Checklist

 Show only Checklist

Display Style  
Default 

## Data Ownership & Responsibilities

Defines roles and responsibilities for CRM data management, including ownership, access control, and data quality.

### Data Owner Identification

- Sales Data
- Marketing Data
- Customer Service Data
- Finance Data

### Data Owner Name (for selected data type)

Write something...



### Data Owner Contact Information

Write something...

### Data Steward Role Assignment

- Data Quality
- Data Security
- Compliance

### Data Steward Name (for selected role)

Write something...

### Specific Data Ownership Responsibilities

Write something...

### Number of Users with Data Admin Rights

Enter a number...

### Last Review Date of Data Ownership Assignments

Enter date...

## Data Quality Standards

Outlines acceptable data quality levels, including accuracy, completeness, consistency, and timeliness. Includes processes for data validation and cleansing.

### Acceptable Data Accuracy Rate (%)

### Maximum Missing Fields Allowed (%)

### Standard Data Format (e.g., MM/DD/YYYY)

- MM/DD/YYYY
- YYYY-MM-DD
- Other (Specify)

### Required Field Validation Checks

- Mandatory Field Presence
- Data Type Validation
- Format Validation
- Length Validation
- Range Validation

### Next Data Quality Audit Date

Enter date...

### Data Cleansing Procedures Documented?

Write something...

## Security & Access Control

Details security protocols and access control mechanisms to protect sensitive CRM data. Covers user authentication, authorization, and data encryption.

### Authentication Method

- Username/Password
- Multi-Factor Authentication (MFA)
- Single Sign-On (SSO)

### Failed Login Attempts Allowed

Enter a number...

### Password Expiration Date

Enter date...

### User Roles & Permissions

- Administrator
- Sales
- Marketing
- Support
- Read-Only

### Data Encryption at Rest

- Enabled
- Disabled

### Data Encryption in Transit

- TLS 1.2 or Higher
- Other

## Change Management

Establishes procedures for managing changes to the CRM system, including customizations, integrations, and configurations.

**Describe the proposed change and its purpose.**

Write something...

### Change Category (e.g., Customization, Integration, Workflow)

- Customization
- Integration
- Workflow
- Data Migration
- Other

### Estimated Effort (in hours)

Enter a number...

### Proposed Implementation Date

Enter date...

### Affected Areas/Modules (Select all that apply)

- Sales
- Marketing
- Service
- Reporting
- All

### Change Requestor Name

Write something...

### Approval Deadline

Enter date...

# Compliance & Regulatory Adherence

Ensures CRM practices align with relevant industry regulations and legal requirements (e.g., GDPR, CCPA).

## Applicable Regulations (Select All)

- GDPR
- CCPA
- HIPAA
- PCI DSS
- Other (Specify in Long Text)

## Specification of 'Other' Regulations

Write something...

## Last Compliance Assessment Date

Enter date...

## Number of Data Subject Access Requests Received (Last 12 Months)

Enter a number...

### Data Transfer Mechanisms (If Applicable)

- Standard Contractual Clauses (SCCs)
- Binding Corporate Rules (BCRs)
- Adequacy Decision
- Other (Specify in Long Text)

### Specification of 'Other' Data Transfer Mechanisms

Write something...

### Compliance Documentation

 Upload File

## User Training & Documentation

Covers training programs for CRM users and creation of comprehensive documentation for system usage and best practices.

### Training Objectives Overview

Write something...

### Training Modules Covered

- Basic Navigation
- Contact Management
- Opportunity Management
- Reporting & Dashboards
- Customization (if applicable)

### Scheduled Training Date

Enter date...

### Training Start Time

Enter time...

### Number of Trainees Attended

Enter a number...

### Training Delivery Method

- In-Person
- Webinar
- Self-Paced Online

## Training Materials (e.g., Slides, Manuals)

 Upload File

## Post-Training Feedback Summary

Write something...

# Performance Monitoring & Optimization

Details processes for monitoring CRM system performance, identifying bottlenecks, and implementing optimizations.

## Average Page Load Time (seconds)

Enter a number...

## API Response Time (milliseconds)

Enter a number...

## Concurrent User Capacity

Enter a number...

### Database Query Performance Score (scale of 1-10)

Enter a number...

### Current CRM Server Configuration

- Standard
- Optimized
- Custom

### Date of Last Performance Review

Enter date...

### Description of Recent Optimization Efforts

Write something...

## Audit Trail & Reporting

Defines requirements for maintaining an audit trail of system activities and generating reports for governance purposes.

### Last Audit Review Date

Enter date...

### Number of Audit Trails Reviewed

Enter a number...

### Audit Trail Export Method

- CSV
- XML
- API
- Direct Database Access

### Summary of Audit Findings

Write something...

### Date of Last Data Export Audit

Enter date...

### Report Types Generated

- User Activity Report
- Data Modification Report
- Security Event Report
- Compliance Report

### Last Audit Report Generation Time

Enter time...

# Business Process Alignment

Ensures CRM processes are aligned with overall business objectives and workflows.

## Describe how CRM supports Sales Process

Write something...

## Describe how CRM supports Marketing Processes

Write something...

## Describe how CRM supports Customer Service Processes

Write something...

## Number of Integrated Business Processes

Enter a number...

### Primary Business Process Currently Not Supported by CRM

- Sales
- Marketing
- Customer Service
- Other

### Date of Last Business Process Review Alignment

## Review & Improvement Cycle

Establishes a regular review cycle for CRM governance policies and procedures to ensure ongoing effectiveness and identify areas for improvement.

### Last Review Date

### Frequency of Review (in months)

## Summary of Review Findings

Write something...

## Areas for Improvement Identified

- Data Quality
- Security
- User Training
- Process Efficiency
- Integration

## Action Items & Ownership (for identified improvements)

Write something...

## Target Completion Date (for action items)

Enter date...

### Review Status

- Not Started
- In Progress
- Completed
- Deferred

### Reviewer Signature