

CRM Governance Checklist

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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

Enter date...

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

Enter date...

Frequency of Review (in months)

Enter a number...

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