



CRM Implementation Checklist

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Project Planning & Scope Definition

Define project goals, scope, team roles, budget, timeline, and success metrics.

Project Name

Write something...

Total Budget

Enter a number...

Project Start Date

Enter date...



Project End Date (Estimated)

Enter date...

Project Goals & Objectives

Write something...

Project Methodology (e.g., Agile, Waterfall)

- ☐ Agile
- ☐ Waterfall
- ☐ Hybrid

Key Stakeholders

- ☐ Sales Team
- ☐ Marketing Team
- ☐ Customer Service
- ☐ IT Department
- ☐ Executive Management

Scope Description (Inclusions & Exclusions)

Write something...

Requirements Gathering & Analysis

Document detailed business requirements, user stories, and process flows.

Describe current business processes related to sales/marketing/customer service

Write something...

Which departments will be using the CRM?

- ☐ Sales
- ☐ Marketing
- ☐ Customer Service
- ☐ All Departments

Estimated number of users

Enter a number...

What are the key features required in the CRM?

- ☐ Lead Management
- ☐ Contact Management
- ☐ Opportunity Management
- ☐ Sales Forecasting
- ☐ Reporting & Analytics
- ☐ Workflow Automation

Describe any specific reporting requirements

Write something...

What level of CRM customization is anticipated?

- ☐ Minimal
- ☐ Moderate
- ☐ Extensive

Attach any existing process documentation

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CRM Selection & Vendor Evaluation

Evaluate different CRM platforms, compare features, pricing, and vendor support.

Budget Allocation for CRM Software

Enter a number...

Deployment Preference (Cloud vs. On-Premise)

- ☐ Cloud
- ☐ On-Premise

Required Features (Select all that apply)

- ☐ Sales Force Automation
- ☐ Marketing Automation
- ☐ Customer Service
- ☐ Reporting & Analytics
- ☐ Customization Options

Key Requirements & Priorities

Write something...

Vendor Comparison Spreadsheet (if available)

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Preferred Vendor Support Model

- ☐ Email
- ☐ Phone
- ☐ Live Chat

Data Migration Planning

Plan data cleansing, transformation, and migration strategy from legacy systems.

Describe the scope of data to be migrated.

Write something...

Estimated number of records to be migrated.

Enter a number...

Data Source Type

- ☐ CSV
- ☐ Excel
- ☐ Database
- ☐ Other

Identify potential data quality issues (duplicates, inaccuracies, missing data).

Write something...

Data Cleansing Required (Select all that apply)

- ☐ Duplicate Removal
- ☐ Address Standardization
- ☐ Data Deduplication
- ☐ Field Formatting

Planned Start Date of Data Migration

Enter date...

Describe the data transformation rules (e.g., field mapping, data formatting).

Write something...

Data Migration Execution

Execute the data migration process, ensuring data integrity and accuracy.

Number of Records Migrated

Enter a number...

Data Cleansing Notes

Write something...

Migration Method Used

- ☐ CSV Import
- ☐ API Integration
- ☐ Manual Entry
- ☐ Other

Migration Start Date

Enter date...

Migration End Date

Enter date...

Number of Errors Encountered

Enter a number...

Error Details & Resolution Steps

Write something...

Migration Log File

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CRM Configuration & Customization

Configure CRM settings, customize fields, workflows, and dashboards.

Default Currency

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD
- ☐ AUD

Default Opportunity Stage Percentage

Enter a number...

Default User Roles

- ☐ Sales
- ☐ Marketing
- ☐ Service
- ☐ Admin

Custom Field Descriptions (for Documentation)

Write something...

Default Lead Source

- ☐ Website
- ☐ Referral
- ☐ Trade Show
- ☐ Cold Call

Custom Logo URL

Write something...

Default Dashboard Widgets

- ☐ Sales Pipeline
- ☐ Lead Conversion Rate
- ☐ Open Opportunities
- ☐ Customer Satisfaction

Integration with Existing Systems

Integrate the CRM with other business systems (e.g., marketing automation, accounting).

Which systems will be integrated with the CRM?

- ☐ Marketing Automation
- ☐ Accounting/ERP
- ☐ E-commerce Platform
- ☐ Customer Service Platform
- ☐ Other (Specify in LONG_TEXT)

If 'Other' was selected, please specify the systems to be integrated.

Write something...

Integration Method (e.g., API, Middleware, Direct)

- ☐ API Integration
- ☐ Middleware
- ☐ Direct Database Connection
- ☐ Other (Specify in LONG_TEXT)

If 'Other' was selected for Integration Method, please specify the method.

Write something...

Estimated Number of API Calls per Day (approximate)

Target Completion Date for Integration

Integration Design Document (if available)

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User Training & Adoption

Develop training materials and conduct user training to ensure adoption.

Number of Users to Train

Training Delivery Method

- ☐ In-Person
- ☐ Online (Live)
- ☐ Online (Recorded)
- ☐ Self-Paced Modules

First Training Session Date

Enter date...

Training Content Outline

Write something...

Key Training Modules Covered

- ☐ Lead Management
- ☐ Contact Management
- ☐ Opportunity Management
- ☐ Reporting & Dashboards
- ☐ Workflow Automation

Training Materials (e.g., guides, presentations)

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Post-Training Survey Method

- ☐ Email Survey
- ☐ In-App Survey
- ☐ Discussion Forum

Testing & Quality Assurance

Conduct thorough testing to identify and resolve bugs and ensure functionality.

Test Environment Status

- ☐ Ready
- ☐ In Progress
- ☐ Blocked

Number of Test Cases Executed

Number of Test Cases Passed

Number of Test Cases Failed

Detailed Description of Failed Test Cases

Screenshot/Error Log (if applicable)

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Data Validation Status

- ☐ Verified
- ☐ Not Verified
- ☐ Partial Verification

Date of Last Test Run

Enter date...

Go-Live & Deployment

Plan and execute the go-live process, including data verification and user support.

Planned Go-Live Date

Enter date...

Scheduled Downtime Window (if applicable)

Enter time...

Go-Live Communication Plan Details

Write something...

Deployment Environment

- ☐ Production
- ☐ Staging
- ☐ Sandbox

Number of Users Impacted

Enter a number...

Rollback Plan Description (in case of critical issues)

Write something...

Pre-Go-Live Validation Checklist (Completed)

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Sign-off - Project Lead

Post-Implementation Review & Optimization

Evaluate the CRM implementation success, gather user feedback, and optimize processes.

User Adoption Rate (%)

Enter a number...

Summary of User Feedback

Write something...

Overall Project Success (Scale of 1-5)

- ☐ 1 - Not Successful
- ☐ 2 - Needs Significant Improvement
- ☐ 3 - Moderately Successful
- ☐ 4 - Successful
- ☐ 5 - Highly Successful

Areas for Improvement

- ☐ Data Quality
- ☐ User Training
- ☐ Workflow Automation
- ☐ Reporting & Analytics
- ☐ Integration Performance
- ☐ Customization Requirements

Date of Review

Enter date...

Recommendations for Future Optimization

Write something...

Reviewer Signature