

# 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

 Upload File

## 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

 Upload File

## 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)

 Upload File

## 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)

 Upload File

### 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)

 Upload File

### 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)

 Upload File

### 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**