

CRM Security Audit Checklist

Access Control & Permissions

Review user roles, permissions, and access levels to ensure appropriate data access.

Default User Role Assignment Method

- ☐ Manual
- ☐ Automated
- ☐ Hybrid

Field-Level Security Enabled?

- ☐ Yes
- ☐ No
- ☐ Review Required

Number of Admin Users

Which Profiles have Access to Sensitive Data?

- ☐ Sales
- ☐ Marketing
- ☐ Support
- ☐ Management