



CRM Upgrade Checklist

Planning & Assessment

Initial assessment of current system, upgrade requirements, and potential impact.

Describe the reasons for the CRM upgrade.

Write something...

Estimated number of users impacted by the upgrade.

Enter a number...

Target Go-Live Date

Enter date...

Which functionalities need special attention during the upgrade?

- ☐ Salesforce Automation
- ☐ Marketing Automation
- ☐ Customer Service
- ☐ Reporting & Analytics
- ☐ Integration with other systems