CRM IMPLEMENTATION TEMPLATE

Use this checklist to identify the various items you need to have in place to implement your CRM.

1. Assemble Your CRM Core Team

Refer to our guide for the crucial team members that you need to have in your implementation team. This will depend on what kind of CRM system you will implement—whether it is plug-and-play software or a more complex one that needs technical expertise.

Name	Role	Responsibilities

2. Establish Your CRM Goals & Objectives

Outline the objectives and goals you want to achieve by laying out the parameters of how your team will be measured within the system and how the system is expected to be used.

Goal	Action Plan

3. Determine What Data Needs to Be Migrated

List down all the data that you need to upload from your files or migrate from your previous CRM system.

4. Define CRM Settings & Customizations

Define the settings that you need to customize in your new CRM system. Itemized below some common configurations. Use the extra space to add more.

	Company profile and settings
	Custom fields
	Drop-down menu selections
	User permissions
	Admin settings

5. Integrate Third-party Apps

List down other business tools that you use, which you need to connect to your CRM to centralize your customer data. These could include accounting, project management, and email marketing tools.

Software Functionality	Software Name

6. Test Your New CRM Environment

Itemized below are areas you need to test if they are working properly. Use the extra space to add more.

Working Properly?	Component	What To Test?
	Migrated Data	All imported records are matched to the correct fields, with no duplicate data
	Contacts	All assigned data fields are recognized and fillable
	Email Capture	Email exchanges are associated with the correct contact and two-way email sync works as expected
	Lead Routing	Leads route to the correct sales rep according to predefined rules
	Pipeline Management	Deal columns in each pipeline match the sales process
	Automated Tasks	Task triggers work as expected
	Integrations	All business apps are connected correctly
	Reports	Data matches expected results
	Website Forms	Form displays correctly, fields are fillable, and completed form is routed properly

7.Train Your Users

List the names of the team members who need to use the CRM system and join the training sessions.

Name	Department	Position

8. Measure CRM Adoption

Itemized below are some areas you can track to see the extensiveness of your team's usage of the software. You can check the progress by tracking the increase of usage on a monthly basis. Use the extra space to add more.

Metric	Month 1	Month 2	Month 3
User logins			
Types of data inputs			
Types of CRM-generated reports			
Calls made			