YOURCXC

YOU BOUGHT THE CRM.
NOW MAKE IT PAY OFF.

THIS TOOLKIT HELPS YOU STREAMLINE SYSTEMS AND TURN CONTACTS INTO CONVERSIONS.

WHAT'S INSIDE THE TOOLKIT?

CRM Strategy & Requirements Planner	Define your goals, must-have features, and success criteria for CRM implementation
CRM Evaluation & Comparison Sheet	Assess and score CRM platforms based on your specific business needs.
CRM Data Migration Checklist	Step-by-step guide to preparing and transferring your existing customer data into your new CRM.
CRM Setup & Automation Blueprint	Plan your pipeline stages, automated workflows, tagging systems, and contact segmentation.
Lead & Contact Tracking Template	A simple sheet to track prospects, follow-ups, and engagement before CRM launch.
CRM Adoption & Training Guide	Tips, milestones, and best practices for team adoption, onboarding, and long-term CRM success.

WHO IS THIS FOR?

- Business owners implementing a CRM for the first time
- Sales and marketing teams looking to streamline lead management
- CX and operations leads aiming to unify customer data
- Agencies and consultants helping clients with CRM setup and optimisation

WHAT YOU'LL BE ABLE TO DO

- Choose the right CRM platform for your business
- Migrate and clean your customer data with confidence
- Set up a smart, automated CRM structure
- Train your team and improve system adoption
- Track leads and customer interactions from one central hub

CRM STRATEGY & REQUIREMENTS PLANNER

1. CRM OBJECTIVES

What are your top 3 business goals for using a CRM?

How will success be measured (e.g., lead conversion, retention, revenue)?

Which teams will use the CRM (e.g., sales, marketing, support)?

2. EXISTING SYSTEMS & PAIN POINTS

What tools or spreadsheets are currently in use?

What challenges are you experiencing (e.g., lost leads, manual work)?

What data do you currently track? Where is it stored?

3. KEY CRM FEATURES

Rate each feature based on importance (Must Have / Nice to Have / Not Needed):

Contact management:

Reporting and dashboards:

Lead tracking and sales pipeline:

Automation and workflows:

Email integration and templates:

Custom fields and tags:

Task and follow-up reminders:

Mobile access and usability:

4. INTEGRATION & DATA MIGRATION

What other tools need to integrate (e.g., email, website forms)?

Where is your current customer data stored?

Any concerns about migrating data (cleaning, duplicates, formatting)?

5. BUDGET & TIMELINE

What is your monthly/annual budget for CRM software?

Who will be involved in setup and configuration?

When do you want to go live with your new CRM?

6. EVALUATION & NEXT STEPS

List 3 CRM systems to explore:

Schedule demos or trials by:

Assign internal lead for rollout:

CRM EVALUATION & COMPARISON SHEET

CRITERIA	CRM OPTION ONE	CRM OPTION TWO	CRM OPTION THREE
Ease of Use			
Customisation Options			
Contact & Lead Management			
Sales Pipeline Tracking			
Email Integration			
Automation & Workflows			
Reporting & Analytics			
Mobile Accessibility			
Integration with Other Tools			
Customer Support			
Pricing			
Security & Data Privacy			

CRM DATA MIGRATION CHECKLIST

1. PRE-MIGRATION PLANNING

- [ ] Identify all data sources (spreadsheets, legacy systems, cloud apps).
- [ ] Define the data fields to be migrated (contacts, notes, interactions, etc.).
- [ ] Assign responsibilities to team members for data prep and validation.

2. DATA AUDIT & CLEANSING

- [ ] Remove duplicates and outdated records.
- [ ] Standardise formats for dates, phone numbers, and email fields.
- [ ] Ensure each record has complete and accurate information.

3. CRM FIELD MAPPING

- [ ] Match existing data fields with new CRM fields.
- [ ] Create any custom fields required in the new system.
- [ ] Document all field mapping for reference.

4. DATA BACKUP

- [ ] Export a full backup of all data prior to migration.
- [ ] Store backup securely in case of rollback or recovery needs.

5. MIGRATION EXECUTION

- [ ] Perform a test migration with a sample dataset.
- [ ] Review and verify test data in the new CRM.
- [ ] Proceed with full migration if test results are successful.

6. POST-MIGRATION REVIEW

- [ ] Spot-check migrated data for accuracy.
- [ ] Test filters, reports, and user access.
- [ ] Collect user feedback and document any issues.

7. ONGOING DATA GOVERNANCE

- [ ] Define roles for data entry and maintenance.
- [ ] Schedule regular data audits.
- [ ] Establish data quality standards and reporting.

CRM SETUP & AUTOMATION BLUEPRINT

1. INITIAL SETUP & CONFIGURATION

- Add users and define roles (Sales, Marketing, Support, Admin).
- Configure pipelines (e.g., Lead → Opportunity → Customer).
- Customise deal stages, contact statuses, and lead sources.

2. CRM CUSTOMISATION

- Create custom fields for contacts, companies, and deals.
- Set up tags or segments for contact categorisation.
- Design personalised dashboards for key user roles.

3. EMAIL & COMMUNICATION INTEGRATION

- Connect company email accounts (Gmail, Outlook, etc.).
- Set up email templates for outreach, follow-up, and nurture.
- Enable email tracking, logging, and scheduling.

4. WORKFLOW AUTOMATION SETUP

- Create lead capture workflows from forms or landing pages.
- Automate lead assignment to appropriate reps or teams.
- Set up email sequences for onboarding or re-engagement.
- Automate task creation based on deal stage changes.

5. REPORTING & DASHBOARD CONFIGURATION

- Define KPIs for each team (e.g., conversion rate, deal velocity).
- Build dashboards with charts and tables for real-time visibility.
- Schedule recurring reports to monitor pipeline and performance.

6. TESTING & QUALITY ASSURANCE

- Test form submissions, workflows, and contact updates.
- Validate automations and escalation triggers.
- Run internal test scenarios to ensure logic is sound.

7. LAUNCH & TRAINING

- Conduct live walkthroughs or recorded video training.
- Provide access to a CRM user guide and helpdesk support.
- Collect team feedback and resolve configuration issues.

LEAD & CONTACT TRACKING TEMPLATE

DETAILS	LEAD ONE	LEAD TWO	LEAD THREE	LEAD FOUR	LEAD FIVE
LEAD ID					
FULL NAME					
COMPANY					
EMAIL					
PHONE NUMBER					
LEAD SOURCE					
LEAD STATUS					
STAGE (E.G., NEW, CONTACTED)					
LAST CONTACT DATE					
NEXT FOLLOW-UP DATE					
ASSIGNED TO					
NOTES					

CRM ADOPTION & TRAINING GUIDE

1. PRE-LAUNCH PLANNING

- Identify CRM champions across departments to support rollout.
- Define clear adoption goals (e.g., usage rates, data completeness).
- Develop internal communication to introduce the CRM benefits.

2. USER SEGMENTATION & TRAINING PATHS

- Segment users by roles (sales, marketing, support, leadership).
- Tailor training materials to each user group's workflows.
- Use role-based walkthroughs and feature highlights.

3. TRAINING RESOURCES & DELIVERY

- Create or provide CRM user manuals and quick-start guides.
- Offer live or recorded training sessions with Q&A.
- Set up sandbox environments for hands-on practice.

4. SUPPORT & HELPDESK SETUP

- Assign internal point-of-contact(s) for CRM questions.
- Provide access to CRM provider's help centre and tutorials.
- Establish a ticketing system for ongoing issues or requests.

5. POST-LAUNCH ADOPTION TACTICS

- Schedule check-ins with teams to gather feedback and adjust.
- Gamify CRM usage with leaderboards and usage incentives.
- Share success stories of CRM wins internally.

6. ONGOING TRAINING & CONTINUOUS IMPROVEMENT

- Hold quarterly refresher sessions for all users.
- Introduce new features and integrations as they launch.
- Keep documentation updated with any system changes.

YOURCXC

FIX THE EXPERIENCE.
GROW THE REVENUE.

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