

CRM Health Checklist

Use this checklist to identify whether your CRM is reliable enough for reporting, automation, and AI.

Data Quality

1. Are required fields consistently completed?
2. Are duplicates measured and controlled?
3. Are inactive and obsolete records archived?

Process

1. Are lifecycle stages clearly defined?
2. Are lead ownership and handoff rules documented?
3. Are sales and marketing using the same definitions?

Reporting

1. Do dashboard numbers match source systems?
2. Can leadership trace KPIs to clear definitions?
3. Is reporting automated and refreshed on schedule?

Governance

1. Is there a named owner for each critical field?
2. Are imports validated before upload?
3. Are privacy, retention, and consent rules documented?

AI Readiness

1. Is the data standardised enough for reliable models?
2. Can historical outcomes be linked to leads and accounts?
3. Are permissions and sensitive fields controlled?