CRM IMPLEMENTATION / 01

DEFINE GOALS, USERS AND RECORDS

Describe business needs with fictional labels. Keep all production identities, records, values and credentials outside this worksheet.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

CRM Project A / neutral label / no account or tenant ID

Business outcome and decision owner / role label only

User group and job-to-be-done / no real user identities

Record type and lifecycle stage / fictional example only

Field group or required information category / no values

Must-have, optional feature and unresolved decision

Preparation only. Not configuration, migration, data processing, security, privacy, architecture, control, compliance, business-process or legal advice. Keep production data, identities, credentials, endpoints, exports and security findings out.

CRM IMPLEMENTATION / 02

MAP SOURCES, WORKFLOWS AND BOUNDARIES

Ask who supplies, maps, approves, tests and supports each source, workflow or dependency.

Current source system or file type / label only / no export

Cleanup, mapping, duplicate or validation responsibility

Workflow trigger, stage or owner / fictional scenario

Role, permission, retention or necessary-data question

Integration purpose, direction and dependency owner

Test, acceptance, cutover, fallback and support boundary

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CRM IMPLEMENTATION / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not authorize access, migration, configuration, processing, cutover or a security or privacy conclusion.

- [ ] Every provider receives the same non-sensitive CRM Project A brief
- [ ] Production data, identities, exports, credentials and endpoints stay outside
- [ ] Goals, user groups, record types and field groups have business owners
- [ ] Required outcomes, optional features and unknowns are separated
- [ ] Cleanup, mapping, duplicates, validation and acceptance roles are requested
- [ ] Permission, retention and necessary-data questions await authorized review
- [ ] Test evidence, approvals, cutover checkpoints and fallback are requested
- [ ] Training, documentation, admin ownership, export and support are requested

Open goal, record, field or workflow decision

Unclear data, permission, integration or testing responsibility

Missing cutover, fallback, training or admin-handoff detail

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CRM IMPLEMENTATION / 04

QUESTIONS FOR THE CRM IMPLEMENTER

Record the answer and where it appears in the proposal, mapping plan, responsibility matrix, test plan or handoff list.

Discovery: how are goals, users, records and fields confirmed?

Data: who cleans, maps, deduplicates, tests and accepts?

Access: how are roles, permissions and necessary data reviewed?

Integrations: what moves, which way and who owns dependencies?

Launch: what evidence, approvals, cutover and fallback are included?

Handoff: what training, documents, exports and support arrive?

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CRM IMPLEMENTATION / 05

COMPARE THE SAME CRM PROJECT A BRIEF

Use Provider A and B. Clarify unlike data, workflow, integration, test or handoff assumptions before comparing proposals.

Provider A / B / proposal dates / shared CRM Project A brief

Goals, records, fields, workflows and owners - A / B

Data, permissions, integrations and testing - A / B

Cutover, fallback, training, handoff, exclusions and fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Web Design & Development request for CRM implementation. Share a non-sensitive CRM Project A goals, records, workflow, test and handoff brief so participating pros can compete with proposals. Compare mapping, permissions review, integration boundaries, testing, cutover, fallback, training, documentation, support and fit. A private systems, data, privacy, security and authorized-owner review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private systems, data, privacy, security and authorized-owner review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/business-automation/crm-implementation

Federal Trade Commission: Start with Security — A Guide for Business (official reference)

National Institute of Standards and Technology: Privacy Framework (official reference)

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