
CEO TRANSFORMATION TECHNOLOGIES LLC

CRM READINESS CHECKLIST™

See whether your lead and client process is actually under control.

FREE CEO RESOURCE

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HAVE YOU OUTGROWN SPREADSHEETS?

The test is not whether you own CRM software. The test is whether you can answer a basic question quickly: **Who needs to be followed up with today?** If the answer requires checking DMs, text messages, email, a spreadsheet and somebody's memory, the process is already telling you what needs work.

A CRM SHOULD REDUCE SEARCHING

I would rather have a simple CRM the team keeps updated than a complicated one with forty fields nobody trusts. Every required field creates work. Keep the information that helps someone make a decision, serve the client or trigger the next step.

CRM READINESS - CHECK YES IF TRUE

1. ☐ Every lead is stored in one central place.
2. ☐ I can see each lead's current stage.
3. ☐ I know when the next follow-up is due.
4. ☐ Customer contact information is organized.
5. ☐ Client documents are stored consistently.
6. ☐ Appointments and reminders are tracked.
7. ☐ I can identify the source of each lead.
8. ☐ I can see open opportunities and expected value.
9. ☐ I can track invoices/payments or connect to the system that does.
10. ☐ I can assign tasks to staff or contractors.
11. ☐ I can see overdue tasks.
12. ☐ I can automate repetitive follow-up.
13. ☐ Clients can submit forms/documents without messy email chains.
14. ☐ I can generate simple reports.
15. ☐ My current system can support more customers without breaking.

YOUR CRM GAP SCORE

UNCHECKED	INTERPRETATION
0-3	Your system may be working well. Focus on optimization and reporting.
4-7	You likely have process gaps a better CRM could reduce.
8-11	Manual tracking and inconsistent follow-up may be costing time.
12-15	A centralized CRM or process redesign should be a high priority.

The process causing the most confusion is:

The first CRM change I would make is:

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