CRM Implementation – Getting Started Checklist

(Use this checklist as a guide when migrating from spreadsheets/email to your new CRM system.)

1. **Inventory Your Contacts:** Gather all current contacts/leads from spreadsheets, email lists, etc., and remove duplicates or outdated entries.
2. **Choose Your CRM:** Pick a CRM platform (e.g. **HubSpot CRM** for its free core features) and create your account.
3. **Clean Up Data:** Standardize data formats (consistent names, phone numbers, etc.) and ensure key info (email, phone, company) is present for each contact.
4. **Set Up CRM Basics:** Add team users, define deal pipeline stages, and create any custom fields your business needs (e.g. “Lead Source”).
5. **Map Fields for Import:** Match your spreadsheet columns to CRM fields (e.g. make sure “Client Email” maps to the CRM’s Email property).
6. **Test Import with Sample:** Import a small batch of contacts first to confirm everything appears correctly in the CRM (proper field mapping, no duplicates).
7. **Import All Contacts:** Upload the full contact list and let the CRM import and de-duplicate records as needed. Verify a few records post-import.
8. **Integrate Email and Tools:** Connect your email account to log emails automatically. Integrate other tools (web forms, calendar, etc.) so data flows into the CRM moving forward.
9. **Automate Key Tasks:** Set up at least one automation (e.g. follow-up task reminders or a welcome email to new leads) to get immediate efficiency benefits.
10. **Team Training:** Schedule a kickoff training to show your team how to use the CRM for their daily work (entering new contacts, updating deals, pulling reports). Provide a quick-reference guide.
11. **Go Live and Monitor:** Start using the CRM for all new interactions. Monitor usage in the first month – check data quality, address questions, and celebrate wins (like “CRM helped me close a deal!”) to reinforce adoption.
12. **Iterate and Improve:** Solicit feedback and refine your setup. Add more advanced features (e.g. reporting dashboards, chatbots, or HubSpot’s AI tools) as you grow comfortable.

(Check off each step as you complete your CRM implementation. By the end, you’ll have a fully functional system to track leads, customers, and interactions.)