

CRM Health Check

A 30-point checklist you can finish in about an hour. It works for Salesforce, Zoho CRM, HubSpot, Dynamics or any other CRM, because it checks how the CRM is used, not which logo is on it.

How to use it

Block an hour with whoever owns the CRM and one sales manager. Go through the six areas below and give each check a score. Be honest. A score of 0 for 'don't know' is still useful, because it tells you what to find out first.

Score each check	2 = yes, consistently	1 = partly or sometimes	0 = no, or don't know
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Company: _____ CRM: _____ Date: _____ Reviewed by: _____

1. Data quality

Bad data is the most common reason a CRM stops being trusted.

#	Check	How to check it	Score
1.1	Duplicate contacts and accounts are under 3% of records, and someone checks monthly.	Run your duplicate report and divide by total records.	0 1 2
1.2	Every new lead gets an owner within one business day.	Filter for leads created in the last 30 days with no owner.	0 1 2
1.3	Phone, email and country are filled in on at least 90% of active contacts.	Count blanks in those three fields.	0 1 2
1.4	Records that are dead (bounced, left the company, closed-lost over 2 years) are archived, not left in reports.	Check when the last clean-up happened.	0 1 2
1.5	There is one agreed list of picklist values (stages, sources, industries) and nobody can free-type them.	Look for 'Other' or misspelled entries.	0 1 2

2. Sales process and pipeline

Reports are only as good as the stages behind them.

#	Check	How to check it	Score
2.1	Each deal stage has a written exit rule, and reps can say it without looking it up.	Ask two reps to name the rule for stage 3.	0 1 2
2.2	Open deals with no activity in 30 days are reviewed every week.	Sort open deals by last activity date.	0 1 2
2.3	Close dates in the past are rare (under 5% of open deals).	Filter open deals with a close date before today.	0 1 2
2.4	Forecast numbers match what finance expects within 10%.	Compare last quarter's forecast to closed revenue.	0 1 2
2.5	Lost reasons are captured on every closed-lost deal.	Count closed-lost deals with a blank reason.	0 1 2

3. Adoption and usage

A CRM nobody opens is just an expensive address book.

#	Check	How to check it	Score
3.1	At least 80% of licensed users logged in during the last 30 days.	Pull the login history report.	0 1 2
3.2	Reps log calls, meetings and notes in the CRM, not only in email or personal notes.	Spot-check five recent deals.	0 1 2
3.3	New hires get a CRM walkthrough in their first week.	Ask the last person who joined.	0 1 2
3.4	Managers run pipeline reviews from the CRM, not from spreadsheets.	Sit in on the next review.	0 1 2
3.5	There is a named owner for the CRM, with time set aside for it.	If the answer is 'everyone', it is nobody.	0 1 2

4. Automation and integrations

Workflows that nobody remembers building are a risk.

#	Check	How to check it	Score
4.1	Every active workflow, flow or automation rule has a documented purpose and owner.	Export the list and see how many have no description.	0 1 2
4.2	Automations that failed in the last 30 days have been looked at.	Check the error log or failed-job queue.	0 1 2
4.3	Website forms, email and marketing tools write to the CRM without manual copy and paste.	Submit a test form and follow the record.	0 1 2
4.4	Integrations have a named owner and a known failure alert.	Ask who is told when a sync breaks.	0 1 2
4.5	Nothing critical relies on a retired API version, personal login or one person's laptop.	Check connected apps and the users behind them.	0 1 2

5. Reporting and dashboards

A dashboard should end an argument, not start one.

#	Check	How to check it	Score
5.1	Leadership can see pipeline, conversion by stage and win rate in one place.	Open the main dashboard and time it.	0 1 2
5.2	The same number gives the same answer in two different reports.	Compare open pipeline in two reports.	0 1 2
5.3	Reports with no views in 90 days have been removed.	Sort reports by last run date.	0 1 2
5.4	Lead source is tracked back to closed revenue, not only to leads.	Pick one source and trace it to revenue.	0 1 2
5.5	Anyone can explain how a key metric is calculated.	Ask for the definition of 'qualified lead'.	0 1 2

6. Security, access and cost

Quiet problems that show up in an audit or a renewal.

#	Check	How to check it	Score
6.1	Users who left the company have been deactivated.	Compare the user list with HR's leaver list.	0 1 2
6.2	Permission sets match job roles, and few people have full admin rights.	Count admin users.	0 1 2
6.3	Sensitive fields (personal data, contract values) are limited to people who need them.	Check field-level security on two fields.	0 1 2
6.4	Data is backed up on a schedule, and a restore has been tested.	Ask when the last restore test happened.	0 1 2
6.5	You use at least 70% of what you pay for (licences, add-ons, storage).	Compare the invoice with real usage.	0 1 2

Your score

Add up all 30 checks. The maximum is 60. Also write down each area's subtotal (maximum 10) so you can see where the weak spot is.

Area	Subtotal (0-10)
1. Data quality	_____
2. Sales process and pipeline	_____
3. Adoption and usage	_____
4. Automation and integrations	_____
5. Reporting and dashboards	_____
6. Security, access and cost	_____
Total (0-60)	_____

What the total means

48 to 60	Healthy. Keep the monthly habits that got you here and re-run this check every six months.
32 to 47	Workable, with gaps. Pick the two lowest areas and fix those before adding any new feature or tool.
16 to 31	Slipping. People are probably working around the CRM. Start with data quality and adoption; reports will not improve until those do.
0 to 15	Needs a reset. Before buying anything, decide what the CRM is for, who owns it, and which five fields matter. Then clean up and rebuild from that.

Your first three fixes

1. _____ Owner: _____ Due: _____
2. _____ Owner: _____ Due: _____
3. _____ Owner: _____ Due: _____

Notes from delivery work

Fix data before automation. An automation on top of duplicate or blank fields only spreads the mess faster. Cut before you add: removing a field nobody fills in does more for adoption than adding a dashboard. And give the CRM one owner with real time set aside; most of the low scores we see trace back to nobody owning it.

Need a second pair of eyes?

If your score lands under 32, or you are weighing a move to a different CRM, Ashapura Softech can run this review with you and turn the findings into a scoped plan. See ashapurasoftech.com/crm-software-development/ or write to ankur.p@ashapurasoftech.com.

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