How to Prepare for CRM Integration: User Checklist

This sample checklist guides you through the typical steps involved in a successful CRM integration. Your Partner will happily work with you to develop a detailed checklist for your Company's needs.

Administrative Preparation

- ☐ Identify Data Owners
- ☐ Identify Data Pools to integrate
- ☐ Confirm Owner Buy-in
- ☐ Agree Project Owner(s)
- ☐ Confirm Project Funding
- ☐ Determine Deadlines
- ☐ Determine security levels and access
- ☐ Ensue backup/restore procedures

Business Preparation

- ☐ Review data needs of new CRM system to determine integration requirements
- ☐ Specify workflows
- ☐ Specify reporting requirements
- ☐ Identify client data requirements
- ☐ Confirm Sales Team needs; organization, territory and client detail requirements
- ☐ Confirm data to be moved and how to represent this in the CRM system
- ☐ Identify frequency of data transfer
- ☐ Identify sequences of events associated with data transfer
- ☐ Confirm security and access levels

Data Integration Assessment

- ☐ Confirm source databases that data will come from
- ☐ Understand data structure differences across systems
- ☐ Identify data manipulation needed eg different date formats
- ☐ Assess data quality; duplicates, inconsistencies, omissions
- ☐ Clarify data setup in new system
- ☐ Quantify data transfer load

Resources Review

- ☐ Are there sufficient internal resources for the CRM integration? If yes, costs?
- ☐ Are external Services required for all or part of the integration? If yes, budget?
- ☐ Is a tool required for integration?
- ☐ Who will be responsible for internal testing? Is a team required?

Integration Preparation

- ☐ Map fields between the old system and the new system
- ☐ Screen for duplicates
- ☐ Clean data / manage data quality
- ☐ Setup queries/profiles/routines as appropriate
- ☐ Train users on new CRM system

Migration Test Run

- ☐ Ensure backup availability
- ☐ Run test, check results, refine Integration criteria, repeat
- ☐ If part of a chain of data transfer test as a whole
- ☐ Review and check audit trails
- ☐ Check new reports work as expected
- ☐ Confirm User Acceptance

Run Integration

- ☐ Ensure backup availability
- ☐ Reserve down-time window
- ☐ Run integration
- ☐ Check audit trails
- ☐ Check results
- ☐ Ensure trained personnel
- ☐ Have support on hand to aid and assist
- ☐ Cut-over to new integration process