

## Your CRM health check\_

Want to find out if – and where – your CRM is holding you back? Work through the questions below, ticking those that apply to your organisation. Then, count your ticks and use the scoring guide at the bottom to see where you stand.

### Data quality\_

Do your team members update CRM records manually after calls, emails or meetings?

*Think about how information actually gets into your CRM day-to-day.*

Do you regularly find duplicate, incomplete or out-of-date records in your CRM?

*Consider whether you trust the data you see when you open a contact or account.*

### Visibility\_

Would getting a clear pipeline or status update require chasing someone or opening a spreadsheet?

*Think about the last time someone asked you for a progress update.*

Does your leadership team rely on manually compiled reports rather than live CRM data?

*Think about how your weekly or monthly reporting actually gets produced.*

### Adoption\_

Are there people in your team who avoid the CRM and work around it instead?

*Are there holdouts using email threads, notebooks or their own spreadsheets?*

Has your CRM never been properly configured to match how your team actually works?

*Think about whether the fields, stages and views reflect your real processes or are just from an out-of-the-box template.*

### Integration\_

Do your teams copy or re-enter information between your CRM and other tools?

*Think about handoffs between sales, ops, finance or customer service.*

Is there no single place where your team can see a complete picture of a customer (such as history, open tasks and recent activity)?

*Think about what a new team member would need to find before a customer call.*

### AI and automation\_

Are there repetitive tasks your team does every week that you suspect could be automated?

*Think about follow-up emails, status updates, data entry, reminders or report generation.*

Would it be difficult to show your MD or board a direct link between CRM usage and commercial outcomes?

*Think about whether you could quickly demonstrate how CRM activity connects to revenue, retention or efficiency.*

## Count your checkmarks

|      |                 |  |
|------|-----------------|--|
| 0-3  | Healthy         | Your CRM is broadly working. Keep an eye on flagged areas and review quarterly as the business grows.  |
| 4-6  | Some friction   | Clear signs of friction that tend to compound. Worth addressing soon before they get harder to unpick. |
| 7-10 | Needs attention | Your CRM is likely costing more than it saves. Most of this is fixable without a full replacement.     |

### What is your CRM really costing you?

It's easy to brush off CRM issues as just a minor frustration, but they often have a financial cost. This is what to think about to understand what the current situation is costing your business and what fixing it could be worth.

- **Admin time:** What is the average amount of hours a week spent on CRM admin, across every user? Multiply that by the hourly cost per person, dependent on salary.
- **Reporting overhead:** How many reports are built manually each month and how long does it take? Consider that as an hourly cost, based on the salary of those creating them.
- **Handoff and re-entry cost:** How many cross-team handoffs involve re-entering data, and how much time does it take? Work that out as an hourly cost for every person involved.
- **Missed opportunities:** How many leads have been lost due to a lack of follow up? What would the average deal value be for those? This is incoming money your CRM is costing you.

### What to do next\_

Pick the category with the most yes answers. That's your highest-friction area. Start there, rather than fixing everything at once.

**For data quality or adoption issues:** talk to two or three people who work around the CRM. Find out why there are issues and remember it's rarely a people problem.

**For visibility or reporting issues:** identify one report that gets compiled manually every week. That's your first automation target.

**For integration issues:** map your top three cross-team handoffs and identify exactly where data gets re-entered. Prioritise those connections first.

**Scored 7 or above?** It's time to upgrade your CRM to something that works



Get in touch for a no-obligation, no-nonsense call with one of our experts.

