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CRM SETUP CHECKLIST

Stop your sales team from running in opposite directions.

The 4-step playbook to get pipeline visibility in 30 seconds

STEP 1 MAP YOUR REAL DEAL STAGES

- [ ] Review your last 5 closed-won deals
- [ ] Write down every step that actually happened (not what you think should happen)
- [ ] Identify: Was there a discovery call? Demo? Proposal? Decision-maker loop-in?
- [ ] Create pipeline stages from those real steps (not CRM defaults or blog templates)
- [ ] Build a Kanban view with your custom stages

> *"Your stages should reflect how your deals actually move, not an idealized playbook."*

STEP 2 DEFINE OWNERSHIP & REQUIRED FIELDS

- [ ] Assign a deal owner to every deal — no orphaned deals
- [ ] Associate the right contacts/people to each deal
- [ ] Identify 3 key qualifying questions (e.g., Budget confirmed? Decision maker? Timeline?)
- [ ] Create ONLY the fields that answer your Monday morning questions
- [ ] Remove or skip any field that won't show up in a report you'd actually look at

> *"Every field you add is something a rep has to fill in. The more junk, the less they fill in anything."*

STEP 3 SET UP WORKFLOWS THAT CATCH SKIPPED STEPS

- [ ] Stalled deal alert — notify deal owner when a deal hasn't moved in 14 days
- [ ] Stage gate enforcement — block/alert when required fields are missing at stage transitions
- [ ] Auto-task creation — create follow-up tasks when deals hit key stages (e.g., "Send recap email within 24 hours")
- [ ] Auto-fill close date — when a deal is marked won, record the close date automatically

> *"A Google Doc nobody opens doesn't enforce anything. Make the system catch the skipped steps."*

STEP 4 BUILD YOUR 30-SECOND DASHBOARD

- [ ] Report 1: Active deals by stage — see where deals are getting stuck
- [ ] Report 2: Stalled deals — deals untouched for 14+ days, grouped by owner and stage
- [ ] Report 3: Deals closing this month — filtered by close date
- [ ] Verify you can answer these 3 questions in under 30 seconds:
    - [ ] How many deals are live right now?
    - [ ] Which ones are stuck?
    - [ ] What's supposed to close this month?

> *"If you can't answer these 3 questions by opening one screen, you don't have visibility yet."*
