

SoftwareGlimpse CRM Go-Live Checklist

Updated: 15 Aug 2026

Project / CRM: _____
Owner / Team: _____
Date: _____

Freeze, verify, then open — and staff the first week.

HOW TO USE THIS RESOURCE

- 1 Enter freeze
- 2 Audit seats and access
- 3 Confirm data and sync
- 4 Run launch-day smoke
- 5 Make the open decision
- 6 Run hypercare and exit

Key: [] Pass [] Partial [] Fail [] Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT
1. FREEZE GATE					
1.1	Freeze start and end announced	Untested changes landing beside new users cause incidents nobody can explain.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Emergency change path defined	A total freeze gets ignored quietly; an approval path gets followed.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Pilot exit and open risks reviewed	Launching over an unresolved pilot defect repeats it at full scale.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Pause criteria read in the briefing	Under launch pressure, teams push through the failures they had agreed to stop for.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. SEATS, ACCESS & DATA GATE					
2.1	Licence report reconciled with the launch roster	Sellers locked out on day one stop trying, and spare seats cost money quietly.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Sample logins completed per role	Identity and provisioning problems only show themselves at the login screen.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Manager visibility checked on team deals	Managers who cannot see their team's pipeline revert to spreadsheets in the first week.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Restricted roles verified as restricted	Over-permissioned launches stay quiet right up until they do not.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Data cutover signed off or marked not applicable	Launch morning is far too late to discover the load never finished.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. LAUNCH-DAY SMOKE GATE					
3.1	Login and search for a known record	Users form their opinion of the system in the first few minutes.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Create a contact and a deal	Creation is the first thing a seller does and the first place required fields bite.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.3	Advance a stage and set a next step	Stage and next step are the spine of every pipeline report you will run this week.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.4	Email sync heartbeat green on sample mailboxes	Sync failure is the most common day-one outage and the least visible to the launch team.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
3.5	Manager board and forecast view open	The first pipeline review of the week depends on these views loading with real filters.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.6	Day-one integrations checked	An integration failing silently creates manual work nobody has assigned.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. OPEN DECISION & COMMUNICATIONS						
4.1	Sponsor records an open or delay decision	"Live" should mean a decision was made, not that a date arrived.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	Announcement held until after the decision	Announcing before verification turns a fixable issue into a trust problem.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Manager brief covers running the week from the CRM	If managers do not switch, nobody below them switches either.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	Support routes published with the announcement	Users who cannot find help within a minute go back to what they know.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. HYPERCARE GATE						
5.1	On-call rota published with names and hours	Shared responsibility on day one means nobody answers first.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Single intake channel with severity definitions	Issues scattered across direct messages are never counted, prioritised, or closed.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Daily triage while hypercare is open	Themes stay invisible when issues are handled one at a time.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Duplicate and hygiene watch in the first days	Day-one data habits set the standard for the rest of the year.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Hypercare exit with owners for what remains	Hypercare that fades away leaves unassigned work and no closure.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Completion guidance

Pass = done with evidence. Partial = in progress.
Fail = blocked. Not tested = deferred on purpose.

Evidence matters

Note owners, dates, and proof in Evidence /
Notes so handoffs stay clear.

Work top to bottom

Finish must-have (*) rows before nice-to-haves.
Do not invent a Pass without proof.