

SoftwareGlimpse CRM Implementation Checklist

Updated: 15 Aug 2026

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

Pass each rollout gate before you start the next one.

HOW TO USE THIS RESOURCE

- 1 Freeze the MVP
- 2 Assign gate owners
- 3 Configure and review
- 4 Connect sync, dedupe, and seats
- 5 Pilot on real deals
- 6 Clear the pilot exit gate

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. SCOPE & OWNERSHIP GATE					
1.1	MVP objects, stages, and fields frozen	Open scope means the build keeps moving and no gate can ever close.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	One named owner per workstream	Items owned by "the team" stay amber until someone escalates.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Change control agreed	Untracked changes during the build cause regressions nobody can trace.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Gate dates on the calendar	A gate without a date quietly becomes optional.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Week-one and week-four measures written	Without a measure, "it went fine" is the only verdict available after launch.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. CONFIGURATION GATE					
2.1	Objects and required fields match the agreed model	Layouts that drift from the data model break reporting long after anyone remembers why.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Stages and exit checkpoints configured	Stages without checkpoints turn pipeline reviews back into opinion.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Owner and next-step convention enforced	Ownership and next action drive every hygiene report you will run afterwards.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Roles and sharing tested with sample users	Making everyone an admin is the most common rollout shortcut and the hardest to reverse.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Manager pipeline and stuck-deal views built	If managers cannot run the week from the CRM, the team goes back to spreadsheets.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.6	MVP automations inventoried	Automations built before launch are usually the first thing to break under real data.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. INTEGRATION & ACCESS GATE					
3.1	Email and calendar sync working for test users	Sync failures show up as adoption failures, because sellers stop trusting the timeline.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Duplicate rules configured and tested	Duplicates created in the first weeks outlive the project.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

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3.3	Day-one integrations connected	An integration deferred to "later" becomes manual work for sellers on day one.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Seat roster matches the launch cohort	Missing seats block work on day one, and spare seats cost money quietly.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.5	Admin runbook drafted	Support cannot depend on one person remembering how the build works.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. PILOT EXIT GATE						
4.1	Pilot cohort works real deals	Sandbox pilots pass gates that production will fail.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	Stages and next steps hold up in real use	Checkpoints that irritate sellers get bypassed, and the data quietly degrades.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Email sync verified on pilot mailboxes	Real mailboxes behave differently from test accounts, especially at volume.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	A manager runs one pipeline review from the CRM	The first real test of the build is a manager using it under time pressure.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.5	Defects closed or risk-accepted in writing	Undocumented defects come back as day-one incidents with no owner.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.6	Pilot exit signed before wider rollout	Calendar pressure passes gates that evidence would not.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. ENABLEMENT & HANDOFF GATE						
5.1	Role-based training delivered before launch	Training after launch competes with firefighting and usually loses.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Support intake and coverage named	Issues with no route home become reasons to stop using the CRM.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Ongoing admin ownership assigned	The implementation ends; the CRM does not.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Handoff to migration and go-live confirmed	Rollout gates, the data move, and launch day are three different jobs with different failure modes.	-		☐ 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.