

SoftwareGlimpse CRM Optimization Checklist

Updated: 15 Aug 2026

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

Diagnose a live CRM before you change it.

HOW TO USE THIS RESOURCE

- 1 Run the health pass
- 2 Pick one theme
- 3 Set the exit condition
- 4 Ship one small change
- 5 Reinforce for two weeks
- 6 Re-measure and decide

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. HEALTH PASS — MEASURE BEFORE YOU CHANGE					
1.1	Signal: share of open deals without a dated next step	It is the single clearest indicator of whether the pipeline is being managed in the system or in people's heads.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Signal: active users by role over the last thirty days	Paid seats that nobody opens are both wasted spend and an early warning about the rollout.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Signal: does the weekly review run from a CRM view?	If the review still starts with an export, the reporting layer has not been adopted regardless of what exists.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Signal: active automations without a named owner	Unowned rules are the main source of alert fatigue, and fatigue teaches people to ignore the system.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Side channels still in daily use	A parallel spreadsheet is not a workaround, it is a competing system of record.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.6	Nothing changed during the health pass	Fixing things while measuring destroys the baseline you need to prove the fix worked.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. ADOPTION — ARE PEOPLE WORKING IN THE SYSTEM?					
2.1	Three users interviewed about what they skip and why	The specific field people skip tells you more than any aggregate usage report.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Required fields audited against real work	Fields required for reporting convenience rather than selling are the most common cause of abandoned records.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Each weekly ritual mapped to a specific CRM view	A ritual with no view behind it will always drift back to a spreadsheet.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Mobile or field update friction assessed (or N/A)	Sellers who cannot update from a phone will batch their updates, and batched updates are usually invented.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Closed-won handoff completeness measured	When delivery cannot get context from the record, they stop opening it and the CRM loses half its users.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. DATA TRUST — WHAT MAKES THE REPORTS WRONG					

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
3.1	Open deals under inactive or departed owners identified	A forecast containing deals nobody is working is not a forecast, it is a wish list.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.2	Duplicate rate spot-checked on contacts and accounts	Once search returns duplicates, sellers stop searching, and every new record makes it worse.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.3	Stage definitions re-read with the people using them	When stages describe aspiration instead of verifiable checkpoints, every downstream report inherits the fiction.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Stuck deals listed against a stage-age threshold	Silent aging inflates the pipeline and hides the deals that actually need coaching.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.5	Win and loss reasons checked for usefulness	A picklist that everyone answers with the same default value produces coaching data worth nothing.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. REPORTING & FORECAST TRUST						
4.1	Forecast categories reconciled with stage meanings	When commit means something different to each manager, the roll-up is arithmetic on inconsistent inputs.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	One shared view designated for the weekly review	Competing private views are why two people bring different numbers to the same meeting.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Unused dashboards and views archived	Dashboard clutter makes the trusted view harder to find and dilutes whatever authority it had.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	One number reconciled between CRM and its side channel	Until the CRM and the shadow spreadsheet agree, people will keep trusting the spreadsheet.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.5	Report ownership assigned	An unowned report drifts out of date and quietly becomes another reason to distrust the system.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. AUTOMATION & INTEGRATION DEBT						
5.1	Full automation inventory with owner, trigger, and last run	You cannot judge automation debt from memory — most teams find rules nobody remembers creating.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Unowned and failing rules disabled with a changelog entry	A rule firing into the void causes real damage — wrong tasks, wrong emails, and lost trust.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Auto-task completion rate checked	A rule generating tasks nobody completes is training the whole team to dismiss notifications.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Email and calendar sync failures spot-checked	Silent sync failure is worse than no sync, because people believe the timeline is complete when it is not.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Inbound and billing integrations verified end to end	A broken form integration creates leads nobody sees and a second system of record nobody declared.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6. ADMIN CAPACITY & THE NEXT DECISION						
6.1	Admin hours per week confirmed as actually available	Every finding on this page needs someone with time to act on it, or the debt simply rebuilds.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.2	Change log started for stages, fields, and rules	Without a change log, nobody can connect a broken report to the change that broke it.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
6.3	Role-based refresh scheduled for the theme you shipped	A configuration change without a short refresh session gets reverted by workaround within weeks.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.4	Exit condition re-measured with the original method	Changing the measurement method between baseline and re-measure is how teams convince themselves of progress they did not make.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.5	Access review queued with the security checklist	Permission drift accumulates quietly and is not something an optimisation sprint should silently inherit.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.6	Decision recorded: continue, pause, or reopen evaluation	Optimising around a capability the product genuinely lacks wastes more than a replacement evaluation would.	*		☐ 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.