

CUSTOMER REVIEW WORKBOOK

CRM Drift Health Check

A practical review of how well your CRM still reflects the way your business works today

REVIEW OWNER _____

DATE _____

STATUS Initial review / Follow-up review

Purpose

CRM drift is the gradual widening gap between how a business operates and how its CRM was originally configured. This checklist identifies where that gap is creating workarounds, unreliable information, wasted effort or unnecessary friction.

Review principle

This is not a test of how many features the CRM has. It is a practical review of people, process, data, technology and business outcomes.

How to complete the review

Discuss each statement with the people who use the CRM and the managers who rely on its information. Mark Yes, Partly or No / unsure, then record evidence and examples. The objective is not a perfect score. It is to identify which gaps are worth closing first.

REVIEW AREAS 1-2

Business objectives and User adoption

1. Business objectives

Is the CRM still aligned with where the business is going?

When objectives change but the system does not, workarounds grow and management visibility weakens.

☐	Our top three business goals for the next 12 months are clear.	YES	PARTLY	NO / UNSURE
☐	The CRM supports each of those goals.	YES	PARTLY	NO / UNSURE
☐	The system reflects our current products, services, teams and markets.	YES	PARTLY	NO / UNSURE
☐	We know what successful CRM use should look like a year from now.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
The CRM describes the business as it used to be.
New priorities are managed outside the system.

Notes / evidence

2. User adoption

Are people genuinely working in the CRM, or routing around it?

Spreadsheets, inboxes and local habits are usually symptoms that the system no longer supports the process properly.

☐	All relevant teams use the CRM consistently.	YES	PARTLY	NO / UNSURE
☐	Important customer activity is recorded in the system.	YES	PARTLY	NO / UNSURE
☐	Managers use CRM reports in day-to-day decisions.	YES	PARTLY	NO / UNSURE
☐	We understand why any users avoid parts of the system.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Spreadsheets have returned for routine work.
New starters learn inherited habits rather than a documented process.

Notes / evidence

REVIEW AREAS 3-4

Data quality and Sales process and forecasting

3. Data quality

Can your people trust the customer record?

Duplicates, gaps and inconsistent terminology weaken reporting, follow-up and customer experience.

☐	Duplicate company and contact records are actively managed.	YES	PARTLY	NO / UNSURE
☐	Key fields are complete and used consistently.	YES	PARTLY	NO / UNSURE
☐	Stages and categories mean the same thing across teams.	YES	PARTLY	NO / UNSURE
☐	Users can quickly find the correct customer history.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Two versions of one customer hold half the story each.
Teams reconcile data before they can use it.

Notes / evidence

4. Sales process and forecasting

Does the CRM reflect how sales really works today?

When stages and follow-up processes drift, the real forecast moves into someone's head or spreadsheet.

☐	Every genuine opportunity is tracked in the CRM.	YES	PARTLY	NO / UNSURE
☐	Sales stages describe the current buying journey.	YES	PARTLY	NO / UNSURE
☐	Follow-ups are visible, owned and completed on time.	YES	PARTLY	NO / UNSURE
☐	Management trusts the pipeline and forecast.	YES	PARTLY	NO / UNSURE
☐	Lead sources and win/loss reasons are recorded.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Meetings debate the numbers instead of the decision.
Forecasts are adjusted by instinct.

Notes / evidence

REVIEW AREAS 5-6

Customer service and continuity and Automation and workflows

5. Customer service and continuity

Is the full service history available to whoever needs it?

If customer knowledge lives in inboxes or workarounds, service quality depends on who answers.

☐	Support requests and key customer conversations are logged.	YES	PARTLY	NO / UNSURE
☐	Response, resolution and escalation processes are visible.	YES	PARTLY	NO / UNSURE
☐	Managers can identify recurring issues and trends.	YES	PARTLY	NO / UNSURE
☐	Customer feedback is captured consistently.	YES	PARTLY	NO / UNSURE
☐	Cover and handovers do not rely on one person's memory.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Customers repeat information the business already holds.
A leaver or absence removes context.

Notes / evidence

6. Automation and workflows

What manual effort has quietly become normal?

Small tasks repeated every day make capacity and growth more expensive than necessary.

☐	Follow-ups and task creation are automated where appropriate.	YES	PARTLY	NO / UNSURE
☐	Customer notifications happen consistently.	YES	PARTLY	NO / UNSURE
☐	Sales-to-service handovers are structured and visible.	YES	PARTLY	NO / UNSURE
☐	Approvals and renewals do not rely on memory.	YES	PARTLY	NO / UNSURE
☐	Automation is reviewed when processes change.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Skilled people spend time copying and re-entering.
Headcount absorbs work the system could handle.

Notes / evidence

REVIEW AREAS 7-8

Reporting and visibility and Integrations and data flow

7. Reporting and visibility

Do reports answer today's business questions, and are they trusted?

Plausible reports that nobody trusts are often more dangerous than reports that are obviously broken.

☐	Management can name the reports it relies on.	YES	PARTLY	NO / UNSURE
☐	Those reports are accurate, current and trusted.	YES	PARTLY	NO / UNSURE
☐	Pipeline, retention, service and team activity are visible.	YES	PARTLY	NO / UNSURE
☐	We know which important questions the CRM cannot answer.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Managers maintain their own version of the truth.
Decisions rest on partial or uncertain data.

Notes / evidence

8. Integrations and data flow

Do connected systems still match how the business works?

Manual re-entry between supposedly connected systems is a clear sign a review is overdue.

☐	The CRM connects to the systems that matter today.	YES	PARTLY	NO / UNSURE
☐	Website, accounting, Microsoft 365 and marketing data flows are understood.	YES	PARTLY	NO / UNSURE
☐	Users are not routinely entering information twice.	YES	PARTLY	NO / UNSURE
☐	Finance, sales and service data reconcile.	YES	PARTLY	NO / UNSURE
☐	Integration ownership and failure handling are clear.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Someone quietly bridges integration gaps by hand.
Systems disagree about the same customer.

Notes / evidence

REVIEW AREAS 9-10

Ownership and continuous improvement and Future growth

9. Ownership and continuous improvement

Who is responsible for keeping the CRM aligned?

A system with no owner cannot evolve. It can only age.

☐	A named person or group owns CRM effectiveness.	YES	PARTLY	NO / UNSURE
☐	Change requests have a clear route and priority.	YES	PARTLY	NO / UNSURE
☐	Feedback and friction are reviewed, not worked around.	YES	PARTLY	NO / UNSURE
☐	Training and process guidance stay current.	YES	PARTLY	NO / UNSURE
☐	CRM health is reviewed after meaningful business change.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Requests go nowhere, so people stop asking.
Return on the system declines each year.

Notes / evidence

10. Future growth

Will the current setup make the next stage easier or harder?

CRM drift rarely causes dramatic failure. It quietly makes growth slower, more expensive and less certain.

☐	The system supports planned growth in teams, products and locations.	YES	PARTLY	NO / UNSURE
☐	New departments can work from the same customer view.	YES	PARTLY	NO / UNSURE
☐	The CRM reduces friction as volume increases.	YES	PARTLY	NO / UNSURE
☐	We know the highest-value improvements for the next six months.	YES	PARTLY	NO / UNSURE
☐	We know what must change before the next stage.	YES	PARTLY	NO / UNSURE

Signs of CRM drift
Every hire embeds current workarounds more deeply.
New tools fragment the customer view.

Notes / evidence

REVIEW SUMMARY

Priorities and next actions

Translate the findings into practical priorities. Focus first on the areas where CRM drift is creating the greatest business cost, operational risk or barrier to growth.

Greatest strengths

What is working well and should be protected?

Biggest gaps

Where has the CRM moved furthest from the way the business now operates?

Costs already being paid

Where are you seeing missed revenue, wasted effort, weak forecasting, inconsistent service or slower growth?

Quick wins: next 30 days

Which configuration, data, process or training changes could help immediately?

Strategic improvements: 3-12 months

Which changes require ownership, planning, integration work or wider process redesign?

Final question

Which improvement would make the greatest difference to the way your business sells, serves customers or grows?