

Zoho CRM Readiness Checklist

24 practical checks across five areas to tell whether your business is ready to implement Zoho CRM (or any CRM) — and where to focus first if it isn't. Tick everything that is true today, then score yourself on page 2.

01 Sales process clarity

- ☐ Our sales stages are written down, from first enquiry to closed deal.
- ☐ We can name every source our leads come from.
- ☐ We have agreed criteria for what makes a lead “qualified”.
- ☐ Every pipeline stage has a clear owner.
- ☐ We have a target response time for a new lead — and we know it.

A CRM amplifies the process you already have. If the process is unclear, start here — not with software.

02 Data readiness

- ☐ We know every place customer and lead data lives today (even if it's scattered).
- ☐ We have decided which historical data must move into the CRM — and what can be archived.
- ☐ We have an honest sense of how bad our duplicate problem is.
- ☐ We have a draft list of the fields we actually need (not every field we can imagine).
- ☐ Someone will own data quality after go-live.

Clean-enough data beats complete data. Migration works best with a clear keep / archive / discard decision.

03 Team & adoption

- ☐ A CRM owner or champion has been named.
- ☐ Roles and permissions have been thought through — who sees and edits what.
- ☐ Training time is budgeted for the whole team, not just the admin.
- ☐ The team knows why the CRM is coming and what's in it for them.
- ☐ We have agreed how success will be measured 90 days after go-live.

Most CRM projects fail on adoption, not configuration. This section predicts success better than any other.

04 Automation opportunities

- ☐ We can list the follow-ups that get missed most often today.
- ☐ We know how new leads should be routed (by territory, product line or round-robin).
- ☐ We have listed the notifications and alerts people actually need — and no more.
- ☐ The reports leadership wants each week or month are written down.
- ☐ We know which approvals slow deals down today.

05 Integrations

- ☐ Email and calendar tools are listed.
- ☐ Phone and WhatsApp channels used for sales are listed.
- ☐ The accounting or finance tool the CRM should talk to is identified.
- ☐ Website forms and every other inbound lead source are listed.

Your score	What it means
20–24 ticks	Ready. Configuration will move quickly — put your energy into adoption and clean migration.
13–19 ticks	Nearly ready. Close the gaps in your weakest section first — most of them are quick, structured conversations, not projects.
0–12 ticks	Not yet — and that's fine. Start with section 01: a CRM amplifies whatever process exists, including an undefined one.

Want a second pair of eyes on your answers?

I offer a free, no-obligation CRM audit — a focused review of your process, tools and data with prioritised quick wins and an honest view of what a Zoho CRM implementation would involve for your business.

Book your free audit: shubhamkumarsingh.com/#audit

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