aibrevo

FREE CHECKLIST · 2026 EDITION

The CRM Setup Checklist

The checks our engineers run before, during and after a CRM build. 32 core checks that apply to any CRM, plus a page of platform checks for GoHighLevel, HubSpot, monday CRM and Pipedrive.

How to use it. Go through each part and tick what is already true for your setup.

Anything you cannot tick is either a gap to fix or a question to put to whoever is building your CRM. Most failed rollouts we are asked to repair skipped something in Part 1 or Part 2.

PART 1 OF 4

Before anyone configures anything

These decisions belong to your team, not the vendor. Settling them first is the cheapest work in the whole project.

- [ ] **One named owner for the CRM.**
  Usually a sales ops or RevOps lead who can decide how the process works, not IT alone.
- [ ] **Pipeline stages written down and signed off.**
  For each stage, write what has to be true for a deal to enter it. Get sign-off from the people who run the process, in writing.
- [ ] **A list of required fields, and who fills each one.**
  If nobody owns a field, it will be empty in three months.
- [ ] **Today's process mapped, exceptions included.**
  Paused deals, reopened deals, referrals, renewals. The edge cases live in people's heads until someone asks.
- [ ] **Every tool that must connect is listed.**
  Email, calendar, web forms, ad platforms, phone, billing, support desk, spreadsheets people still rely on.
- [ ] **Success defined as numbers you can check at day 90.**
  For example: every new lead gets a reply within one business day, or pipeline value is visible every Monday without a spreadsheet.
- [ ] **Workshop and testing time booked with the people who will use it.**
  Put it in calendars before the project starts, not during it.
- [ ] **Licence and build budgets set separately.**
  Seat costs recur every month. Setup is a one-off. Mixing them hides the real cost of each.

PART 2 OF 4

Data: clean it, then import it

A CRM does not fix bad data. It just makes bad data easier to see.

- [ ] **Full export from the old system, kept read-only.**
  Include notes, activities and any attachments you are required to keep. Keep the original file for at least 90 days after go-live.
- [ ] **Duplicates removed, with a rule for which record wins.**
  Agree the rule (newest, most complete, owned by the active rep) before anyone starts merging.
- [ ] **A written list of what you will not migrate.**
  Test records, leads nobody has touched in years, contacts who asked not to be contacted.
- [ ] **Formats made consistent.**
  Phone numbers with country codes, one date format, one spelling per country, state and industry value.
- [ ] **Every old column mapped to a new field before importing.**
  Columns with no destination are lost or dumped into notes where nobody can report on them.
- [ ] **A test import of 50 to 100 records, checked by hand.**
  Open them one by one: names, owners, dates, linked records.
- [ ] **Import order planned.**
  Companies first, then contacts, then deals and activities, so the links between them survive.
- [ ] **Consent and opt-out status carried across.**
  A contact who unsubscribed in the old system must stay unsubscribed in the new one.

PART 3 OF 4

The build

Build exactly what Part 1 agreed. Anything new goes on a list for phase two.

- [ ] **Pipelines and stages match the signed-off process.**
  No extra stages added during the build because they seemed useful.
- [ ] **Required fields enforced at the right stage.**
  Ask for information at the stage where people actually know it, not when the record is created.
- [ ] **Lead source captured automatically.**
  Forms, ads and UTM tags fill the source field. Typing it by hand produces "Other".
- [ ] **Email and calendar connected for every user, tested both ways.**
  Send from the CRM, reply from the inbox, and check both show on the record.
- [ ] **Each automation written as "when X happens, do Y" before it is built.**
  Then test it with a real record, not a demo one.
- [ ] **Every alert goes to a named person.**
  Not a shared inbox nobody watches.
- [ ] **Duplicate checks switched on for new records.**
  Forms and integrations create most duplicates after go-live.
- [ ] **Each integration tested end to end, with failure alerts.**
  When a sync breaks, someone should hear about it the same day.
- [ ] **User roles set so people see what they need.**
  Admin rights limited to one or two people.
- [ ] **Two-factor sign-in on for every user.**
  The CRM holds your whole customer list.

PART 4 OF 4

Go-live and the first 90 days

Most CRMs fail after launch, when people quietly go back to their spreadsheets.

- [ ] **Training uses your own data and your own pipeline.**
  A demo account teaches the software, not your process.
- [ ] **A one-page "what I do in the CRM each day" sheet per role.**
  Reps, managers and admins need different pages.
- [ ] **A fixed date when the old system goes read-only.**
  Two live systems means nobody trusts either one.
- [ ] **Three dashboards built first.**
  Pipeline by stage, activity by rep, and lead source through to closed revenue.
- [ ] **Reviews booked for week 1, week 4 and day 90.**
  Check against the success numbers from Part 1, not against feelings.
- [ ] **A change log for fields and automations.**
  Who changed what, when and why. It saves hours the first time something breaks.

PLATFORM CHECKS

Extra checks for your platform

Run the core checks first, then the section for the CRM you use. Plan limits were checked in October 2026 and change often, so confirm them on your own plan page.

GoHighLevel

- [ ] **A2P 10DLC brand and campaign approved before texting US numbers.**
  Unregistered business texts get filtered or blocked by US carriers.
- [ ] **Sending domain authenticated with SPF, DKIM and DMARC.**
  Do it before the first email campaign, not after deliverability drops.
- [ ] **Wallet auto-recharge and a low-balance alert set.**
  An empty wallet stops texts and calls without much warning.
- [ ] **User type and role set per person.**
  Agency or Account type decides which sub-accounts they can enter. Use Only Assigned Data for reps who should see only their own contacts.
- [ ] **Missed-call text-back and reminders tested from a real phone.**
  Call the number, miss it, and check what the caller receives.
- [ ] **The finished build saved as a snapshot.**
  So it can be restored or copied to the next location.

HubSpot

- [ ] **Paid seats only for people who use paid features.**
  Check which users need a paid seat before you buy.
- [ ] **Lifecycle stage and lead status definitions agreed before import.**
  Otherwise every imported contact lands as a "lead" and reports mean nothing.
- [ ] **Gmail or Outlook connected and logging checked for each user.**
  Send a test email and confirm it appears on the contact timeline.
- [ ] **Custom properties grouped and named clearly.**
  Create them before importing, so data does not end up in free-text notes.
- [ ] **Associations included in the import.**
  Contacts should arrive linked to their companies and deals.
- [ ] **Connected apps reviewed.**
  Remove the ones nobody uses, and note who owns the rest.

monday CRM

- [ ] **monday CRM chosen, not Work Management, if you track deals.**
  monday CRM adds deals, two-way Gmail and Outlook sync, forecasting and quotes.
- [ ] **The free plan ruled out for a sales team.**
  It allows up to 2 seats and 3 boards, with no automations or integrations, and it is not the CRM product.
- [ ] **Import files split to fit the limits.**
  Up to 10 MB per file, 8,000 rows for a new board or 10,000 for an existing board.
- [ ] **Contacts, Accounts and Deals boards connected before importing.**
  Connected boards keep the links between people, companies and deals.
- [ ] **Monthly automation and integration actions checked against your plan.**
  Busy boards can use up the allowance before the month ends.
- [ ] **Email and activities sync switched on for each user.**
  Then confirm emails show on the right contact.

Pipedrive

- [ ] **One pipeline per sales process, not one per rep.**
  Use filters and owners to split work between people.
- [ ] **Rotting-deal days set for each stage.**
  The most skipped setting. Without it, dead deals sit in the forecast for months.
- [ ] **Fields that must be filled before a deal moves stage.**
  Keep the list short so reps actually fill them.
- [ ] **Email and calendar sync on for every user.**
  Check that replies attach to the right deal.
- [ ] **Deal visibility set so reps see the right deals.**
  Decide this before you import, not after someone sees the whole pipeline.
- [ ] **Workflow automations checked against your plan's limits.**
  Build the few that save real time first.

Sources for plan limits: monday.com help center and pricing page, HighLevel help docs. Checked October 2026.

NEED A SECOND PAIR OF EYES?

Get your CRM checked against this list, free

On a free 30-minute call, an aibrevo engineer goes through your setup against this checklist and tells you what is missing and what it would take to fix, whether or not you hire us.

Book the free 30-minute review

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