

# CRM

## Reality

### CHECK LIST

...FOR SALES SUPERHEROES

# 12

## CRM Essentials Every Revenue Officer Or Sales Manager Must Review

Your CRM should drive predictable revenue — not cause incorrect forecasts, stalled pipelines, or confused sales reps.



**Read through these 12 points** and honestly check what applies, the gaps in your CRM will reveal themselves.

This checklist is built for Revenue Officers, sales leaders, and ops teams using Salesforce, HubSpot or any CRM who are dealing with messy data, inconsistent activity, or unreliable forecasting.

Each point comes from real audits and clean-ups we've run for teams just like yours.

If even one item hits home, you've found a weak spot worth fixing before next quarter.



*Scott Ferrebee*  
CRM Whizz



with a CRM Clarity Call Here: [lighthillcrm.com/start](https://lighthillcrm.com/start)

# The CRM Reality Check List

## ...FOR SALES SUPERHEROES

- ✓ **1. Are reps updating close dates, or are deals aging like fossils?**  
If every deal says it closes "this month," you don't have a forecast. You have wishful thinking in data form.  
***Why it matters:** Forecasting depends on behavior, not hope. If reps never update close dates, your forecast accuracy will always be off by a mile.*
- ✓ **2. Do your pipeline stages reflect reality, or someone's dream version of it?**  
If your stages read like a motivational poster or require a decoder ring, reps won't use them.  
***Why it matters:** Pipeline stages are your truth serum. If the stages don't match how your team actually sells, your CRM becomes a storytelling tool, not a reporting tool.*
- ✓ **3. Are lifecycle stages defined or guessed?**  
Marketing says someone is an MQL. Sales disagrees. Leadership wonders why nothing makes sense.  
***Why it matters:** Lifecycle stages create alignment across teams. Without definitions, you're basically running two separate businesses on the same database.*
- ✓ **4. Are contact and company records missing the basics?**  
No phone number. No email. No industry. No owner. Half your CRM looks like a census of ghosts.  
***Why it matters:** Bad inputs = bad outputs. Simple as that.*
- ✓ **5. Do duplicate records pop up like weeds?**  
Different owners. Different information. Different history. Same person.  
***Why it matters:** Duplicates destroy trust faster than anything. If you can't trust counts, you can't trust trends.*
- ✓ **6. Do your reports ever match what your reps say is happening?**  
If your CRM says one thing but your team insists something else is true, you're not tracking behavior. You're tracking hope.  
***Why it matters:** Every mismatch is a clue that your system is wired wrong, used wrong, or ignored entirely.*



with a CRM Clarity Call Here: [lighthillcrm.com/start](https://lighthillcrm.com/start)

# The CRM Reality Check List

## ...FOR SALES SUPERHEROES

### ✓ 7. Do dashboards answer the questions your board actually asks?

Boards don't care about vanity metrics. They care about pipeline coverage, conversion rates, marketing ROI, time to close, renewal and expansion.

**Why it matters:** *If your dashboards can't answer these, you're always going to feel exposed in board meetings.*

### ✓ 8. Are third-party tools syncing correctly or creating chaos?

Marketing bought their dream tool. Sales bought theirs. Nothing talks to anything else.

**Why it matters:** *Conflicting data kills adoption. If reps don't trust integrations, they stop using the tools you paid for.*

### ✓ 9. Is your data model too complicated for the size of your team?

Too many fields. Too many options. Too many objects. Too many cooks.

**Why it matters:** *CRMs don't fail from too little complexity. They fail from too much of it.*

### ✓ 10. Does your CRM require superhuman memory to use correctly?

If reps need a checklist just to log activity, they stop logging activity.

**Why it matters:** *Reps don't hate CRMs. They hate complicated CRMs.*

### ✓ 11. Are your marketing and sales numbers telling different stories?

Marketing says a campaign crushed it. Sales says nobody remembers the leads. Finance doesn't believe either one.

**Why it matters:** *Reconciling numbers across multiple systems is a tax on everything: speed, trust, morale and forecasting.*

### ✓ 12. Does your CRM reflect how you actually sell today, or how someone sold three years ago?

Companies evolve. CRMs do not — not unless someone evolves them.

**Why it matters:** *A CRM that reflects yesterday creates confusion today and bad decisions tomorrow.*

Now, calculate your score on the next page...



with a CRM Clarity Call Here: [lighthillcrm.com/start](https://lighthillcrm.com/start)

# CRM

...FOR SALES SUPERHEROES

## Your Score

Count how many times you said "Yes, that's a problem."



- **0-3:** Your CRM isn't lying. It's just a little dramatic.
- **4-7:** You're in the "annoying but manageable" zone. Your reps probably roll their eyes every time they update something.
- **8-10:** Your CRM has officially become a liability. This is where forecasting accuracy dies.
- **11-12:** You're running your business on luck. At this level, leaders start wondering if the board is losing confidence.

## What To Fix First?



Here's the simple order of operations that fixes 90% of broken CRMs:

- Standardize stages and required fields.
- Clean and de-dupe your contacts, companies, and deals.
- Rebuild dashboards that reflect reality.
- Align marketing and sales lifecycle stages.
- Fix integrations or turn off the ones doing damage.
- Simplify everything else.



Do these in order, and you get something most leaders haven't felt in a long time: **Clarity**. If you scored 4 or higher, you've got two options.

**Option 1:** Use this guide to clean up the obvious issues and buy yourself some breathing room.

**Option 2:** Get a free CRM audit that maps the exact fixes, in order, based on your business.

This is the same audit used in migrations, integrations, and cleanups across Salesforce and HubSpot. It's fast, practical, and gives you a clear roadmap that's easy to follow.



with a CRM Clarity Call Here: [lighthillcrm.com/start](https://lighthillcrm.com/start)