



CRM Self-Audit Guide

A practical, step-by-step framework
to uncover data quality issues,
pipeline gaps, and CRM adoption
problems before they damage revenue.

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Before You Begin

Most CRM problems do not start with software. They start with unclear processes, inconsistent behaviour, poor ownership, and reporting that nobody fully trusts. This guide helps you surface those problems systematically, section by section, so you can prioritise fixes that actually improve outcomes.

How to Use This Guide

Work through each of the four sections in order. For every question:

- Read the context and warning signs provided.
- Gather evidence by talking to users, pull reports, or check the CRM directly.
- Assign a score from 1 to 5 using the scoring legend below.
- Note your evidence and set a priority (H / M / L) in the scorecard table.

At the end, transfer your section scores to the Master Summary on the final page to build an overall picture of your CRM health.

Scoring Legend

Score	Meaning	Typical Reality
1	Critical Risk	Teams avoid the CRM and reports are unreliable
2	Unstable	Processes exist but are inconsistently followed
3	Functional	CRM works but requires frequent workarounds
4	Reliable	CRM trusted for most operational decisions
5	Single Source of Truth	CRM is trusted, consistent, and properly governed

 **Before you start: gather these resources**

- A recent CRM export or dashboard screenshot
- Access to talk to 2–3 frontline CRM users (sales, marketing, or customer success)
- Your most recent pipeline or forecast report
- Any known complaints or workarounds people use to avoid the CRM

STEP 1 Data Quality & Structure

WHY THIS MATTERS

Poor data quality is the single most common reason CRM reports lose credibility. When fields are blank, records are duplicated, or contact details are stale, teams stop trusting the system and start maintaining parallel spreadsheets instead. Fixing this first unlocks improvements across every other area.

Data quality is the foundation of everything else. If your records are incomplete, duplicated, or out of date, every report built on top of them will be misleading — even if the pipeline and processes are well designed.

🔍 How to Spot Issues

- Pull a sample of 20–30 records and check completion rates for key fields (e.g. company, deal value, close date, owner).
- Run a duplicate check — most CRMs have a built-in tool. Count the number of obvious duplicates.
- Filter records by 'last modified' date. How many have not been updated in 90+ days?
- Ask a salesperson: 'What fields do you feel forced to fill in that you find pointless?'
- Check whether required fields are actually enforced, or whether users find workarounds.

Are important fields consistently completed?

Inconsistent field completion means your filters, segments, and reports are working with partial data. This is often caused by too many required fields, unclear definitions of what goes in each field, or users not seeing the value of filling them in.

⚠️ Warning Signs

- ▶ Key fields like deal value, close date, or company name are blank on many records.
- ▶ Reports return unexpectedly small numbers, often because blank fields are excluded.
- ▶ Different team members use the same field in different ways (e.g. using a notes field as a status tracker).

✓ If This Scores Low

Audit your required fields and remove any that aren't genuinely useful for reporting or automation. Clearly document what each field is for and share examples of good records with the team.

Are duplicate records common?

Duplicate records silently corrupt your data. A contact appearing twice can distort engagement metrics, trigger duplicate communications, and cause confusion about ownership. They accumulate gradually and are often noticed only when something goes wrong.

⚠️ Warning Signs

- ▶ The same company or contact appears more than once with slightly different spellings.
- ▶ Email sequences are sent to the same person twice.
- ▶ Deal counts or contact totals seem higher than expected.

✓ **If This Scores Low**

Run a deduplication tool and assign someone ownership of the merge process. Introduce an intake process (e.g. 'search before you create') and consider duplicate-detection rules to prevent new ones forming.

Is outdated data affecting reporting?

Old records that were never progressed, closed, or archived drag down your pipeline metrics and inflate contact lists. They also mean that automated outreach or reporting may include people who are no longer relevant.

⚠ **Warning Signs**

- ▶ Large numbers of records with no activity in 6+ months still showing as active.
- ▶ Pipeline reports include deals with close dates that have long since passed.
- ▶ Marketing automation sends to contacts who are clearly no longer relevant.

✓ **If This Scores Low**

Set a regular data review cadence (quarterly at minimum). Create a clear process for archiving or closing stale records and assign ownership so it actually happens.

Section Scorecard

Assessment Area	Score (1–5)	Evidence / Notes	Priority (H/M/L)
Are important fields consistently completed?			
Are duplicate records common?			
Is outdated data affecting reporting?			

STEP 2 Lifecycle & Pipeline Integrity

WHY THIS MATTERS

A pipeline that looks full but behaves unpredictably is more dangerous than one that looks thin. Misaligned stage definitions mean one person's 'Proposal Sent' is another's 'Verbal Agreement'. This leads to over-inflated forecasts, missed handovers, and leadership losing trust in CRM data entirely.

Your pipeline stages represent the journey a deal or contact takes from first contact to close. If those stages are misunderstood, skipped, or inconsistently used, your forecasting becomes guesswork and your handover points between teams break down.

🔍 How to Spot Issues

- Ask three different people (separately) to describe what each pipeline stage means. Compare the answers.
- Check whether any deals have skipped multiple stages at once — this may indicate backdating.
- Map out your intended handover points between marketing, sales, and customer success. Then check whether the CRM actually reflects those handovers.
- Look at how long deals sit in each stage on average. An unusual cluster at one stage often indicates a process problem.
- Check whether stage changes trigger any automation or alerts and whether those are firing correctly.

Can everyone explain the pipeline stages consistently?

Pipeline stage definitions should be the shared language of your revenue team. When salespeople, managers, and marketers disagree on what 'Qualified' or 'Proposal' means, deals get placed in the wrong stages and your pipeline reports stop reflecting reality.

⚠️ Warning Signs

- ▶ Different team members describe the same stage differently when asked.
- ▶ Deals appear to jump stages without explanation.
- ▶ Sales and marketing disagree about when a lead becomes a qualified opportunity.

✓ If This Scores Low

Document a single, agreed definition for every pipeline stage. Include entry criteria (what must be true for a deal to move in) and exit criteria (what must be true for it to move out). Make this visible inside the CRM itself if possible.

Can opportunities skip stages?

Stage skipping happens when the CRM allows (or encourages) users to move deals forward quickly without completing the steps that give each stage meaning. This inflates close probabilities and makes forecasting unreliable.

⚠ Warning Signs

- ▶ Deals move from early stage to 'Closed Won' with no intermediate activity logged.
- ▶ The average time-in-stage is very low, suggesting stages are being clicked through rapidly.
- ▶ Forecast accuracy is consistently poor.

✓ If This Scores Low

Introduce required fields or validation rules at key stage transitions (e.g. a proposal date must be set before moving to 'Proposal Sent'). For high-value deals, consider a manager-approval step.

Are handovers between teams unclear?

The points where a record moves from marketing to sales, or sales to customer success, are where data quality problems most often appear. Ambiguous ownership means nobody takes responsibility, fields don't get updated, and contacts fall through the cracks.

⚠ Warning Signs

- ▶ Leads sit in a handover status for long periods with no action.
- ▶ Customer success teams receive new customers without context from the sales process.
- ▶ Marketing doesn't know whether their leads were actually followed up.

✓ If This Scores Low

Define explicit handover criteria and assign clear CRM ownership at each transition. Use automated alerts or task creation to notify the receiving team when a handover happens.

Section Scorecard

Assessment Area	Score (1-5)	Evidence / Notes	Priority (H/M/L)
Can everyone explain the pipeline stages consistently?			
Can opportunities skip stages?			
Are handovers between teams unclear?			

STEP 3 CRM Usage & Behaviour

WHY THIS MATTERS

Low CRM adoption is rarely a training problem. It's usually a design problem. If users are maintaining spreadsheets on the side, updating records after the fact, or treating the CRM as a box-ticking exercise, the data you're collecting is unreliable regardless of how clean it looks on the surface.

Even a well-designed CRM fails if people don't use it consistently. Usage problems are often a symptom of something deeper — the CRM doesn't reflect how people actually work, it creates extra effort without visible benefit, or there is no accountability for non-compliance.

🔍 How to Spot Issues

- Ask your team: 'What do you track outside the CRM?' If the answer involves spreadsheets, that's a red flag.
- Check the last-modified timestamps on a batch of active records. Are they being updated in real time, or in batches?
- Run a usage report if your CRM supports it — who logged in last week? Who hasn't logged in at all?
- Ask users: 'Is there anything the CRM makes harder than it should be?' Listen for process friction.
- Look at whether the CRM gives users information they actually find useful (e.g. pipeline value, upcoming tasks, open conversations).

Are spreadsheets replacing the CRM?

When teams maintain their own tracking spreadsheets, it is usually because the CRM doesn't support how they work, is too slow or complex, or because they don't see a personal benefit from using it. The spreadsheet becomes the real record and the CRM becomes a reporting facade.

⚠️ Warning Signs

- ▶ Salespeople refer to their own spreadsheets rather than the CRM in meetings.
- ▶ Pipeline reviews require manual data exports and reformatting before they are usable.
- ▶ Different team members maintain separate trackers for the same information.

✓ If This Scores Low

Before adding more enforcement, understand why users have built workarounds. Fix the underlying friction first: simplify fields, improve views, or surface useful information directly in the CRM. Enforcement without improved UX tends to create hidden workarounds rather than solving the problem.

Do users update records too late?

When records are updated in batches — typically before a pipeline review or reporting deadline — the data between updates is unreliable. Decisions made mid-week based on the CRM may be based on stale information, and the 'update rush' introduces errors and backdating.

⚠ Warning Signs

- ▶ Records are consistently updated on the same day each week (often Monday or Friday).
- ▶ Activities and notes are added in batches rather than as they happen.
- ▶ Close dates are frequently changed retrospectively.

✓ If This Scores Low

Align CRM update expectations with the natural rhythm of the sales process. Removing friction from updates (e.g. mobile access, fewer required fields, email-to-CRM logging) is more effective than mandating compliance.

Is the CRM seen as admin rather than useful?

If users experience the CRM purely as a reporting burden rather than a tool that helps them do their jobs, adoption will always be fragile. The CRM should surface useful information — upcoming tasks, deal history, contact context — not just collect it.

⚠ Warning Signs

- ▶ Users describe the CRM as 'just for management'.
- ▶ Nobody checks the CRM before a customer call.
- ▶ There is low engagement with dashboards or personal pipeline views.

✓ If This Scores Low

Focus on making the CRM genuinely useful for frontline users, not just for reporting. This might mean improving contact history views, surfacing upcoming tasks, or reducing the number of steps required to log an activity.

Section Scorecard

Assessment Area	Score (1–5)	Evidence / Notes	Priority (H/M/L)
Are spreadsheets replacing the CRM?			
Do users update records too late?			
Is the CRM seen as admin rather than useful?			

STEP 4 Reporting & Leadership Confidence

WHY THIS MATTERS

When leaders lose confidence in CRM reports, they stop making decisions based on them. This creates a feedback loop: if the data isn't used, there is no accountability to keep it accurate, so it becomes less reliable over time. Restoring reporting confidence usually requires fixing the upstream issues first.

Reporting is where all the upstream data quality, pipeline, and usage issues become visible — or get hidden. If leadership is manually adjusting reports or openly questioning CRM numbers, that's a sign the data problems are already well established.

🔍 How to Spot Issues

- Pull the same metric (e.g. 'open pipeline value') from two different reports or dashboards. Do they match?
- Ask a sales manager: 'How much do you trust the forecast this month?' Listen carefully to the caveats.
- Check whether leadership has access to a live CRM dashboard, or whether they rely on exported reports.
- Ask: 'When was the last time a major decision was made based on CRM data?' If nobody can answer, that's telling.
- Find out whether anyone manually adjusts numbers before presenting them to leadership.

Do dashboards show conflicting numbers?

Conflicting dashboard numbers are often a symptom of different reports using different filters, definitions, or data sources rather than a fundamental data problem. But they erode trust quickly. When two reports disagree, users start to wonder which (if either) is correct.

⚠️ Warning Signs

- ▶ Pipeline value shown on the main dashboard differs from the value in the pipeline report.
- ▶ The same metric has different names or definitions in different parts of the CRM.
- ▶ Teams argue about which number to use in meetings.

✓ If This Scores Low

Standardise the definitions used in your reports and document them centrally. Reduce the number of active dashboards and consolidate around a single source of truth for key metrics. Assign ownership for maintaining report accuracy.

Are forecasts unreliable?

Forecast reliability depends on three things: accurate stage definitions, realistic close dates, and honest deal values. When any of these are consistently wrong — often because users see forecasting as a management exercise rather than a planning tool — the forecast becomes useless for decision-making.

⚠ Warning Signs

- ▶ Win rates are consistently different from what the forecast predicted.
- ▶ Close dates are regularly pushed back by 30+ days.
- ▶ The forecast number changes dramatically in the days before a reporting period closes.

✓ If This Scores Low

Review stage-level conversion rates and close-date accuracy. Consider adding a 'confidence' or 'commit' flag to deals that users self-assess, rather than relying on automated probability by stage. Improve stage definitions to reflect genuine buying progress.

Do leadership teams manually adjust reports?

Manual report adjustment is a clear sign that the CRM data cannot be trusted as-is. It also means that strategic decisions are being made on numbers that are part-CRM, part-judgement — which makes it very difficult to identify what is working and why.

⚠ Warning Signs

- ▶ A spreadsheet-based 'adjusted forecast' is shared alongside the CRM forecast.
- ▶ Reports are exported and modified before being presented to the board or senior leadership.
- ▶ There is no agreed process for what the 'official' pipeline number is.

✓ If This Scores Low

Treat manual adjustment as a diagnostic signal. Identify specifically what is being adjusted and why — that tells you exactly where the data quality or process problems are. Fix those upstream issues rather than accepting ongoing manual correction as normal.

Section Scorecard

Assessment Area	Score (1–5)	Evidence / Notes	Priority (H/M/L)
Do dashboards show conflicting numbers?			
Are forecasts unreliable?			
Do leadership teams manually adjust reports?			

Master Summary

Once you have completed all four sections, transfer your average scores and key notes here to build an overall picture of your CRM health.

Section	Score (1–5)	Key Issues Found	Priority	Recommended Action
Data Quality & Structure				
Lifecycle & Pipeline Integrity				
CRM Usage & Behaviour				
Reporting & Leadership Confidence				
OVERALL AVERAGE				

Interpreting Your Score

4.0 – 5.0	Your CRM is in strong shape. Focus on governance and continuous improvement.
3.0 – 3.9	A functional CRM with identifiable gaps. Prioritise the highest-impact fixes first.
2.0 – 2.9	Structural issues are likely affecting revenue and team confidence. A planned improvement programme is recommended.
1.0 – 1.9	Critical risk. Significant investment in CRM restructuring is needed before reliable reporting is possible.

Common Warning Signs Across All Sections

If any of the following are true, treat them as high-priority regardless of your section scores:

- Sales teams update records after decisions are made, not during the process.
- Leadership relies on spreadsheets instead of CRM dashboards for key decisions.
- Two different reports show different values for the same metric.
- No one has clear ownership of CRM changes or data governance.
- Marketing automation is failing or producing poor results due to data gaps.
- Users openly refer to the CRM as inaccurate or 'just for management'.

What to Do Next

Review your completed scorecard and identify the two or three areas with the lowest scores combined with the highest business impact. Focus your first improvement sprint there before moving on to lower-priority issues.

Common starting points include:

- Field audit and simplification — remove what isn't used, clarify what is.
- Stage definition workshops — get sales, marketing, and leadership aligned.
- Duplicate clean-up and prevention rules.
- Report consolidation — agree on one source of truth for each key metric.
- A short user feedback session to understand why workarounds exist.

Need Further Support?

If this audit has surfaced issues around data quality, pipeline management, reporting confidence, or CRM adoption, Mossfix can help.

CRM audits and health checks • Data quality and governance improvements
Lifecycle and reporting alignment • CRM clean-up and standardisation
90-day CRM improvement programmes • Ongoing governance and data quality support

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