BUTIGA CRM

CRM instead of Excel

A sales team transition checklist

A practical checklist for data preparation, sales pipeline rules, responsibilities, migration, training and post-transition checks.

1. Set a goal before selecting tools

- **Assign a transition owner.** One person aligns data, deadlines and decisions.
- **Describe the problem you are solving.** For example: quotes have no owner, follow-up is overdue or the team cannot see what was agreed.
- **Set the measurable sign of progress.** Track the completeness of owners, deadlines and next steps, rather than an invented overall result.

2. Prepare data

- Save source Excel file as backup.
- Separate companies, contacts, opportunities and activities.
- Remove obvious duplicates, but keep track of the decision.
- Check mandatory fields: name, owner, phase, value, deadline and next step.
- Do not import private notes and data without a clear business purpose.

3. Define sales flow

- Use a small number of clearly different stages.
- For each phase, write the condition of entry and exit.
- Decide who can change the owner, value and status.
- Determine when an opportunity has been won, lost or archived.

4. Do a test migration

- First, import a small representative sample.
- Check local letters, dates, currencies and owners.
- Compare the number of rows and key values with the source.
- Only after the check do full import.

5. Prepare the team

- Everyone knows where to find their daily work.
- Set a minimum rule: no active opportunity without owner, deadline and next step.
- Tie training to a real process, not to tour each menu.
- In the first weeks, quickly correct unclear fields and duplicates.

6. Verify the transition

- New communication and quotes arrive with the correct customer record.
- The manager may see open opportunities and standstills without additional table.
- The operational team gets the deal, the commitment and the deadline without rewriting.
- Excel remains an archive until it is confirmed that the data are complete and available.

Next Step

Checklist is a planning guide, not a substitute for legal, security or accounting evaluation of your data. If you want a practical example, take a look CRM vs Excel and how to organise the sales process.