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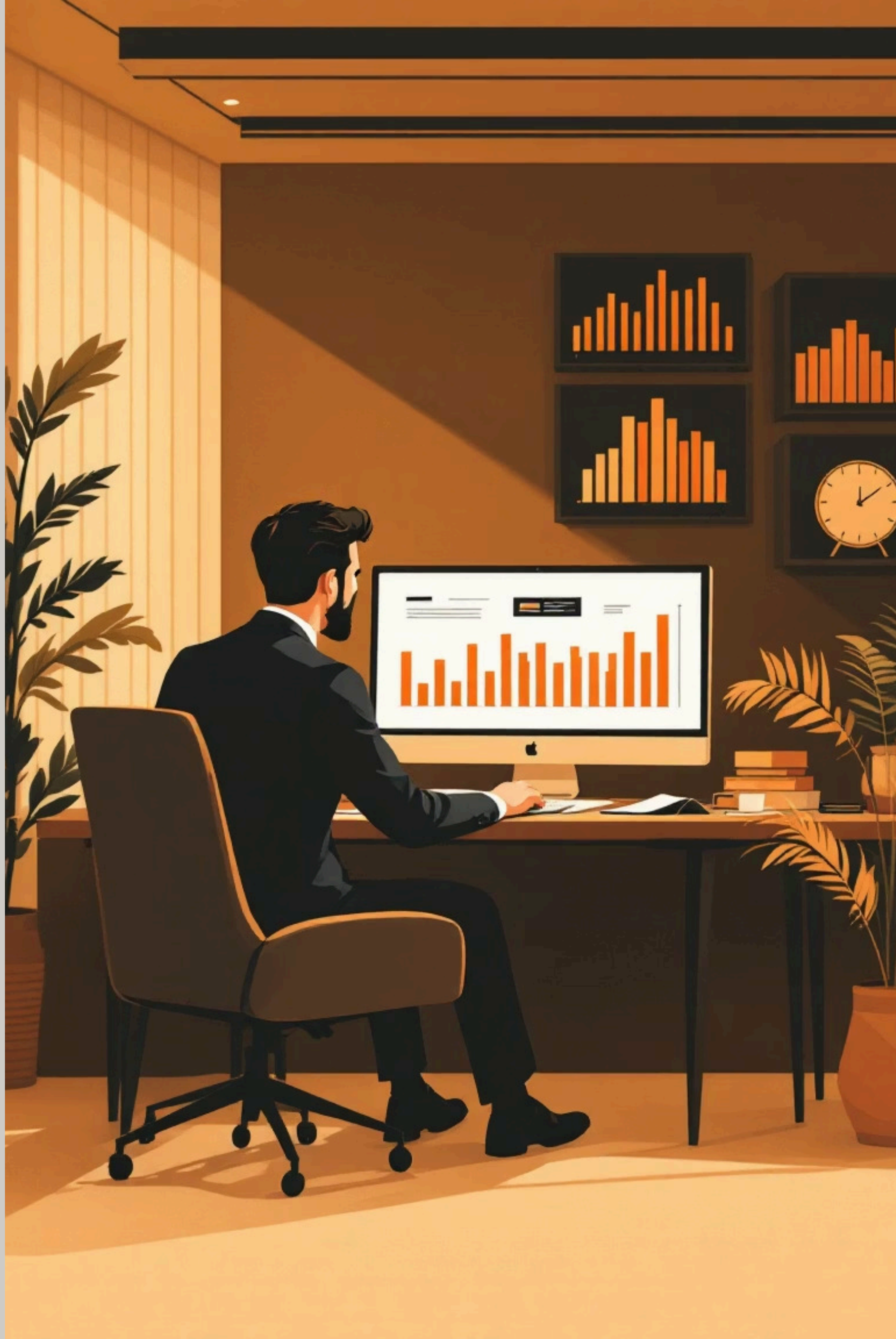
Audit Your CRM for Data Quality in Under 2 Hours

Most leaders think a CRM audit takes weeks of intensive work and dedicated resources. The truth? You can get a remarkably accurate picture of your data health in just 90–120 minutes if you know exactly where to look. This rapid audit framework will help you identify critical gaps, surface hidden revenue leaks, and prioritize quick wins that drive immediate impact.

InflectionPointe | Revenue Operations Consulting & Strategy



Why Speed Matters in CRM Audits

The Traditional Approach

Comprehensive audits often take weeks or months, requiring extensive resources and causing analysis paralysis. By the time you finish, your data has already changed significantly.

Teams delay critical decisions waiting for "perfect" information that never comes.

The Rapid Audit Method

A focused 2-hour audit identifies the most critical issues immediately, allowing you to take action while problems are still manageable.

This approach prioritizes the 20% of checks that reveal 80% of your data quality issues, enabling faster decision-making and revenue impact.

Clean data isn't a luxury—it's the foundation of predictable revenue. The faster you identify problems, the faster you can fix them and get back to growing your business.

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Your 5-Step Quick Audit Framework

01

Stage-by-Stage Hygiene Check

Review pipeline deals for stuck opportunities and missing next steps

02

Field Completeness Scan

Audit your 10-12 most critical fields for data gaps

03

Duplicate & Ownership Audit

Identify duplicate records and ownership issues

04

Lead → Opportunity → Customer Flow

Trace random records through your entire funnel

05

Automation & Workflow Spot Test

Verify your mission-critical workflows are functioning

Each step takes 15-25 minutes and reveals specific, actionable insights. You don't need perfection—you need clarity on where to focus your cleanup efforts.

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Step 1: Stage-by-Stage Hygiene Check

What to Look For

Open your pipeline view and systematically review each stage for three critical warning signs that expose half your forecasting and process issues:

Deals Stuck 30+ Days

Opportunities that have exceeded their expected timeline by a month or more signal process breakdowns, unclear next steps, or deals that should be marked as lost.

Missing Next Steps

Any deal without a clearly defined next action is essentially stalled. This indicates poor sales discipline and makes accurate forecasting impossible.

Imbalanced Stages

Stages with "everything" crammed in or "nothing" at all reveal broken definitions, inconsistent usage, or stages that don't match your actual sales process.

Time investment: 20-25 minutes. This single check alone will expose the majority of your pipeline reliability issues.

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Step 2: Field Completeness Scan

Identify Your Critical 10-12 Fields

Not all fields are created equal. Focus your audit on the fields that directly impact revenue decisions, routing logic, and reporting accuracy. These typically include ICP criteria, contact information, deal source, product type, expected timeline, and close reason.

80%

Minimum Threshold

Fields below 80% completeness indicate systematic problems

95%

Target Completeness

Critical fields should aim for 95%+ completion rates

10-12

Fields to Audit

Focus on the fields that drive business decisions

Run Your Completeness Report

Generate a quick report showing fill rates for your priority fields. If even a few of these are under 80% complete, you've found your first high-impact cleanup project. Missing data in critical fields directly translates to poor segmentation, broken automations, and inaccurate forecasts.

Time investment: 15-20 minutes to identify and quantify your biggest data gaps.

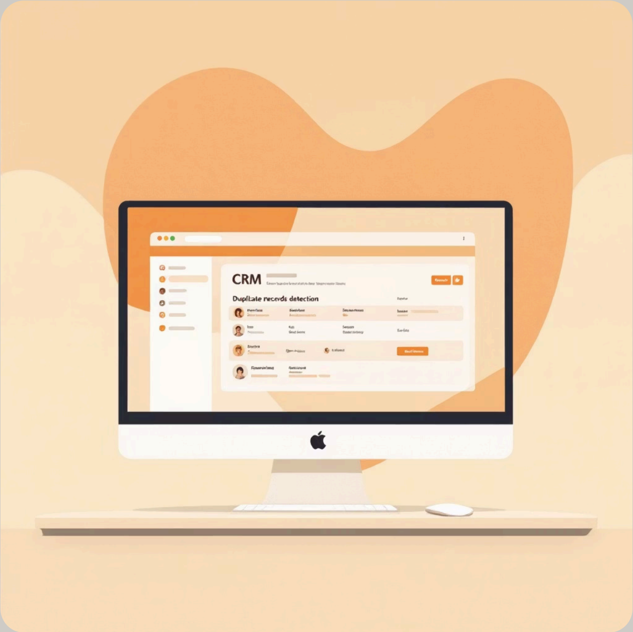
Step 3: Duplicate & Ownership Audit

Finding Duplicates

Search for duplicate records in accounts, contacts, and leads using filters and manual review. Look for:

- Similar company names with slight variations
- Same email domains across multiple accounts
- Identical contact information under different names
- Multiple leads for the same person

Duplicates create confusion, waste sales time, and skew your metrics. A single account with three duplicates might appear as three separate opportunities in your pipeline.



Ownership Issues

Review records with no assigned owner or incorrect ownership. Bad ownership equals bad follow-up, which equals lost revenue. Look for records assigned to inactive users, shared inboxes, or the wrong territory rep.

Time investment: 20-25 minutes. The old-fashioned approach of filters plus eyeballs is often faster and more accurate than automated tools for a quick audit.

Step 4: Lead → Opportunity → Customer Flow Check

Follow the Breadcrumbs

Randomly select 10-20 records and trace them through your entire funnel from first touch to close. This manual spot-check reveals problems that aggregate reports miss entirely.

1 **Did it follow the process?**

Check if the record moved through stages logically and hit required milestones

2 **Did it get routed correctly?**

Verify that routing rules assigned the record to the right team and territory

3 **Did handoffs happen properly?**

Confirm that transitions between SDR, AE, and CS occurred with proper documentation

This exercise exposes broken automations and silent revenue leaks fast. You'll often discover that a workflow failed months ago and nobody noticed because deals were still closing—just fewer of them.

Time investment: 20-25 minutes. This qualitative check complements your quantitative metrics.

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Step 5: Automation & Workflow Spot Test

Test Your Mission-Critical Workflows

Turn off all the noise and focus on the 3-5 workflows that power your entire GTM engine. These typically include lead routing, lifecycle stage progression, deal creation triggers, renewal notifications, and key email sequences.

Lead Routing

Create a test lead and verify it routes to the correct owner based on territory, product, or other criteria. Check timing and notification accuracy.

Lifecycle Stages

Verify that contacts and deals progress through stages automatically when they should, with proper timestamps and activity logging.

Critical Notifications

Test that deal creation, stage changes, and renewal alerts trigger correctly and reach the right people at the right time.

You'll usually find at least one workflow that's been "quietly broken" for weeks, silently costing you opportunities. These silent failures are the most dangerous because they don't generate error messages—just missed revenue.

Time investment: 15-20 minutes to test and document issues.

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Common Patterns You'll Discover

Process Drift

Your documented process doesn't match how teams actually work in the CRM. Stages are being used incorrectly, and custom fields are repurposed for unintended uses.

Silent Automation Failures

Workflows broke when someone made a "small change" months ago. Deals are still closing, so nobody noticed—but conversion rates dropped 15%.

Undefined Standards

Teams interpret field definitions differently. What "Qualified" means to one rep differs from another, making your pipeline unreliable for forecasting.

Systematic Data Gaps

Certain fields are consistently incomplete because they're hard to find, not required at the right time, or integrated systems aren't syncing properly.

These patterns point directly to your highest-impact fixes. A 2-hour audit isn't about solving everything—it's about knowing exactly where to start.

Turn Insights into Action

Your Post-Audit Checklist

After completing your 2-hour audit, you'll have a prioritized list of issues. Now it's time to act:

1. **Categorize findings** by impact and effort—quick wins first
2. **Assign owners** to each cleanup task with specific deadlines
3. **Document process changes** to prevent the same issues from recurring
4. **Schedule follow-up** audits every quarter to maintain data quality
5. **Communicate findings** to stakeholders with clear ROI projections

Remember

You don't need a full rebuild to understand your CRM's health. You just need the right places to look.

Clean data isn't a luxury—it's the foundation of predictable revenue. Start with this 2-hour framework, fix the critical issues, and you'll immediately see improvements in forecast accuracy, sales efficiency, and revenue predictability.

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Audit the current state of your Go-To-Market, design unified Go-To-Market strategies, align SLAs between...

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