

THE CRM TRANSITION CHECKLIST:

A GUIDE TO A SMOOTH SWITCH

Switching your CRM is a strategic decision that can transform your firm's efficiency, advice and client outcomes. To ensure your transition is controlled and your data remains secure, we've provided a step-by-step checklist as you plan your move.

1. Preparing for the change (Timeline & contractual readiness)

- ✓ **The 4-5 Month Window:** Map out a 120-to-150-day transition plan to allow for data migration, team training, and testing before your old contract ends.
- ✓ **Notice Period Check:** Review your current contract to confirm your notice period and identify any potential "data exit fees" or export limitations from your incumbent provider.
- ✓ **Spring cleaning:** Before migrating, audit your current data to remove duplicates or incomplete records so you don't move "dirty" data into a clean environment.

2. Evaluating your options effectively (Considering available CRMs)

- ✓ **Define Your "Must-Haves":** List the specific functional gaps in your current system - such as commission reconciliation, lead generation, or sourcing integration - to keep your demo focused on solutions rather than features.
- ✓ **The "Integrated Sourcing" Handshake:** Specifically ask if your mortgage sourcing platform integrates directly with the CRM. A "tightly integrated" system allows data to flow from sourcing to application without re-keying, reducing errors and saving time.
- ✓ **Prep Your Scenarios:** During the demo, ask the provider to show how the system handles a complex, real-world case - such as a joint application with non-standard income.

3. Successfully navigating the switch (Implementation & risk mitigation)

- ✓ **Nominate a "Champion":** Identify an internal stakeholder to lead the adoption process; these internal advocates are crucial for driving consensus and training others.
- ✓ **Data Migration & Mapping:** Ensure your new provider offers a clear plan for efficiently transitioning your data, that minimises downtime with zero data loss.
- ✓ **Regulatory Proofing:** Verify that the system automates your audit trail and supports Consumer Duty requirements throughout the advice journey.

4. Maximising the Future Opportunity (Ensuring futureproof performance)

- ✓ **Integration Audit:** List your essential third-party tools (AML, e-signatures, credit checks) and ensure the new CRM offers a "modular" approach to integrate them seamlessly.
- ✓ **Data Custody:** Confirm who really owns your CRM provider. Be mindful of potential conflicts of interest - such as your data being used to support other business interests. You should invest in your CRM for the long term- make sure it's with a stable and reliable provider.
- ✓ **Ongoing Support:** Confirm that you will have a dedicated relationship manager to help entrench the solution and maximise the value of your CRM post-launch.