

# CRM Readiness Workbook

A practical workbook for assessing whether sales, service, field and customer-engagement workflows are ready for CRM-led transformation.

## How to use this executive resource

Use this document as a working aid in a leadership, diagnostic, roadmap or advisory discussion. Capture current-state observations, gaps, decisions, owners and immediate next steps before initiating a larger implementation or transformation program.

## Core sections

- Customer and process 360 readiness
- Lead, case and ticket workflow clarity
- Role, permission and dashboard requirements
- Integration and data migration issues
- Adoption, training and governance plan

Area	Current evidence	Gap / risk	Owner	Next step

## Recommended 30-60-90 day conversation

**First 30 days:** Clarify the business problem, current-state baseline, owners, available data and immediate quick wins.

**Next 60 days:** Run the focused diagnostic or workshop, define target-state operating model, prioritise initiatives and create governance cadence.

**Next 90 days:** Launch controlled pilots or execution waves, track adoption, review benefits and refine the roadmap.

## Scope note

This resource is intended for business-readiness and planning conversations. Legal, tax, regulatory, valuation, investment, data-protection and sector-specific compliance advice should be obtained from appropriately qualified professionals where applicable.

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