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AUSTRALIAN DIGITAL AGENCY

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CHECKLIST FOR AUSTRALIAN BUSINESSES

Building a custom CRM?
Seven steps, ten checks.

Work through these in order. Tick each one as it is done. Skipping the first two is the most common reason custom CRMs fail.

- [ ] 01 **Custom build confirmed as the right answer** — Step 1
  Subscription CRMs tested and ruled out for clear reasons.
- [ ] 02 **Daily tasks written down** — Step 2
  What each person does every day that the CRM must support.
- [ ] 03 **Records and relationships designed** — Step 3
  Customers, contacts, jobs, quotes, and how they link.
- [ ] 04 **Version one kept small** — Step 4
  One team, the core records and one or two integrations.
- [ ] 05 **Old data cleaned before migration** — Step 5
  Duplicates removed and fields mapped.
- [ ] 06 **Migration tested on a copy** — Step 5
  Records checked before the real move.
- [ ] 07 **Launched with the people who use it** — Step 6
  Training, a champion in each team, and quick fixes.
- [ ] 08 **Old system retired on a set date** — Step 6
  No running two systems indefinitely.
- [ ] 09 **Feedback collected each month** — Step 7
  What slows people down, and what they work around.
- [ ] 10 **Improvements released in small batches** — Step 7
  Regular, tested updates rather than big overhauls.

Security from day one

Role-based access, audit logs, secure hosting and backups. If the Privacy Act covers you, these are requirements.

Signs it is working

Staff stop keeping side spreadsheets, managers trust the reports, and new requests are about improvements, not workarounds.

Full guide: high10.com.au/blog/how-to-build-a-custom-crm-for-my-business

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