

PLAYBOOK

# CleanCRM Studio

## CRM Administrator Playbook

The Practical Guide to Managing a Healthy CRM  
CleanCRM Studio

• Daily–Annual Task Lists

• 30-Day Onboarding Plan

• SOPs & KPI Dashboard

• Incident Response Guide

This playbook is designed for CRM Administrators in small and medium businesses. Use it as a practical operating manual to keep your CRM clean, reliable and trusted by your sales and marketing teams.

## ■ Role of a CRM Administrator

- Maintain accurate customer data.
- Support sales and marketing users.
- Manage automations and workflows.
- Monitor CRM health and reporting.
- Promote data governance across the business.

### Daily

6 tasks

### Weekly

6 tasks

### Monthly

6 tasks

### Quarterly

5 tasks

### Annual

4 tasks

## 1 Daily Tasks

- ☐ Review new contacts
- ☐ Check lead assignments
- ☐ Review workflow failures
- ☐ Check form submissions
- ☐ Review duplicate alerts
- ☐ Review bounced emails

## 2 Weekly Tasks

- ☐ Review duplicate records
- ☐ Check inactive leads
- ☐ Review imports
- ☐ Validate required fields
- ☐ Review stale deals
- ☐ Review dashboards

## 3 Monthly Tasks

- ☐ Run CRM health check
- ☐ Merge duplicates
- ☐ Archive obsolete records

- ☐ Review workflows
- ☐ Review custom properties
- ☐ Review permissions

## 4

## Quarterly Tasks

- ☐ Review governance
- ☐ Audit pipelines
- ☐ Review integrations
- ☐ Review reports
- ☐ Review user access

## 5

## Annual Tasks

- ☐ Complete CRM audit
- ☐ Review automation strategy
- ☐ Update documentation
- ☐ Deliver user training

## 6

## First 30 Days Checklist

A structured onboarding plan for new CRM Administrators.

## Week 1

— Learn the CRM, review users, pipelines, reports and workflows.

## Week 2

— Audit data quality, duplicates and lifecycle stages.

## Week 3

— Review forms, imports, integrations and marketing assets.

## Week 4

— Present findings and create an improvement roadmap.

## 7

## Standard Operating Procedures

Use this checklist to confirm SOPs are documented for each core task.

- ☐ Create a new contact
- ☐ Create a new company
- ☐ Create a new deal
- ☐ Import contacts
- ☐ Merge duplicate contacts

- ☐ Update lifecycle stage
- ☐ Archive old records
- ☐ Create a report
- ☐ Create a dashboard
- ☐ Create a workflow
- ☐ Manage forms
- ☐ Manage lists

8

## CRM Health Scorecard

| Area         | Score (1–10) | Notes |
|--------------|--------------|-------|
| Accuracy     |              |       |
| Completeness |              |       |
| Consistency  |              |       |
| Duplicates   |              |       |
| Automation   |              |       |
| Reporting    |              |       |
| Overall      |              |       |

9

## Incident Response

|                         |                                                             |
|-------------------------|-------------------------------------------------------------|
| <b>Incorrect import</b> | Stop work, restore backup if required, investigate mapping. |
| <b>Workflow failure</b> | Identify trigger, test in sandbox, republish.               |
| <b>Mass duplicates</b>  | Pause imports, review duplicate settings, merge in batches. |

10

## Monthly KPI Dashboard

- ☐ CRM Health Score
- ☐ Duplicate %
- ☐ Missing Required Fields
- ☐ Inactive Contacts
- ☐ Workflow Errors
- ☐ Lead Response Time

## 11 The 10 Rules Every CRM Administrator Should Follow

- 1 Back up before bulk changes.
- 2 Search before creating records.
- 3 Complete required fields.
- 4 Assign an owner to every record.
- 5 Review duplicates monthly.
- 6 Test imports before importing.
- 7 Document workflow changes.
- 8 Review permissions quarterly.
- 9 Archive obsolete data.
- 10 Keep governance documentation current.

CleanCRM Studio helps Australian businesses improve CRM data quality through audits, cleanup projects, governance frameworks and ongoing CRM administration support.

### Need expert CRM support?

Book a free CRM Health Assessment and receive your CRM Health Score, Data Quality Assessment, Priority Fix List and Expert Recommendations — delivered within 48 hours.

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