

CHAPTER 5 / IMPLEMENT

CRM Implementation and Agency Operating System

Install Conquest as the single source of truth in 14 days, migrate clean data, train every role, and build the management rhythm that keeps the CRM alive.

75% CRM execution	25% growth support
Workflow, data, follow-up, reporting and adoption.	Ads, recruiting, AI, training and templates.

Outcome

This chapter turns Conquest from installed software into the agency's daily operating system. The goal is not to configure every possible field. The goal is to make the critical path reliable: lead received, owner assigned, next action scheduled, conversation recorded, opportunity advanced, client created, renewal protected, commission checked, and management decision made from one record.

By the end, the agency should have one agreed workflow, clean ownership, a tested migration, trained roles, a daily adoption rhythm, and a rollback plan. If a user still needs a private spreadsheet to know what to do next, the implementation is not finished.

Operating rule: if an activity changes a lead, opportunity, client, renewal, recruiting decision, or measurable result, record it in the CRM before the workday ends.

1. Decide what the CRM owns

The single-source-of-truth decision

Write down which system owns each business object. Conquest should normally own sales leads, contact history, pipeline stage, next action, client status, renewal date, responsible agent, sales outcome, and reporting fields. Accounting software may remain the owner of invoices and bookkeeping. Approved document storage may remain the owner of signed documents. The problem begins when two tools both claim to be the master record.

Use these rules:

- One record has one primary owner.
- One field has one authoritative source.
- Every active lead has a stage and next action.
- Every closed sale becomes a client record through the agreed process.

- Every renewable client has a renewal date or a documented reason why not.
- Every imported value has a source and migration date.
- Private customer documents remain only in approved storage locations.

Scope boundaries

Before configuration, classify every requested item as launch-critical, later improvement, or outside scope. Launch-critical items are required to work safely on day one. Later improvements can wait until real usage proves they matter. Outside-scope requests should not be forced into the CRM.

Launch-critical	Later improvement	Outside the CRM unless approved
Users, roles, lead stages, client fields	Advanced automations	Accounting ledger
Ownership, next action, source tracking	Custom dashboards	Signed-document archive
Renewal dates and core reporting	Nice-to-have fields	Unapproved personal notes
Backup, export and access test	Extra integrations	Passwords or authentication codes

2. Name the implementation team

One person must own the rollout. A committee can advise, but it cannot be accountable.

- Executive sponsor: makes policy decisions and removes blockers.
- Implementation owner: maintains the plan, configuration log, issue list, training calendar, and sign-off.
- Data owner: exports, cleans, maps, imports, and reconciles records.
- CRM administrator: creates accounts, roles, fields, stages, products, rates, and permissions.
- Role champions: one Manager, Leader, Agent, and Call Center user who tests real workflows.
- Compliance reviewer: approves data use, messaging, disclosures, retention, and access.
- Support contact: receives launch-week questions and classifies them as training, data, permission, or software issues.

No person should approve their own high-risk migration or permission change without a second reviewer.

3. Map the agency workflow before configuring it

Define the lead lifecycle

Use stage names that describe observable business states, not feelings. A stage should tell a new team member what has happened and what must happen next.

Recommended starting lifecycle:

- 1 New - received but not yet worked.
- 2 Attempting contact - outreach started; next attempt scheduled.
- 3 Connected - two-way conversation occurred.

- 4 Qualified - agreed criteria are met.
- 5 Appointment or quote - the next commercial event is booked or prepared.
- 6 Decision pending - proposal delivered and follow-up scheduled.
- 7 Won - accepted and ready for client conversion.
- 8 Nurture - valid future opportunity with a dated reason.
- 9 Lost - closed with a required loss reason.
- 10 Invalid or duplicate - not a workable opportunity and excluded from normal conversion reporting.

Do not create separate stages for every call attempt. Call attempts are activities. Stages describe the state of the opportunity.

Define entry and exit criteria

For every stage, document four things: what must be true to enter, required fields, required next action, and what moves the record out. This prevents each agent from inventing a different pipeline.

Stage	Entry condition	Required fields	Exit event
New	Valid record assigned	Source, owner, received time	First attempt logged
Connected	Two-way contact	Contact result, need summary	Qualified or nurture decision
Qualified	Criteria confirmed	Need, timing, eligibility notes	Meeting or quote scheduled
Decision pending	Proposal delivered	Product, value, decision date	Won, nurture, or lost
Won	Customer accepted	Product, effective date, value	Client record created

Define the minimum data set

Every extra required field adds friction. Require only what is needed for action, reporting, legal obligations, or handoff.

Minimum lead fields:

- First and last name or approved business identifier.
- At least one permitted contact channel.
- Lead source and campaign where known.
- Received date and time.
- Owner and team.
- Current stage.
- Last activity and next action date.
- Qualification status.
- Outcome and loss reason when closed.

Minimum client fields:

- Linked originating lead or opportunity where available.

- Responsible agent.
- Product or service category.
- Effective date and renewal date where applicable.
- Current status.
- Approved value or commission fields.
- Last review and next review date.

4. Configure roles and permissions

Start with least privilege. A user should see and change what their job requires - no more.

Manager

Managers normally need organization-level settings, users, rates, lead allocation, pipeline oversight, clients, renewals, commissions, reports, exports, training, and audit visibility. Limit the number of full administrators.

Leader

Leaders normally need visibility into their assigned line, agent activity, relevant pipeline, clients, renewals, coaching data, and team reporting. They should not automatically receive access to unrelated teams.

Agent

Agents normally need their assigned leads, personal pipeline, clients, follow-ups, performance, approved templates, and training. They should not see another agent's private book unless the agency has an approved coverage process.

Call Center

Call Center users normally need the assigned lead base, disposition controls, callback scheduling, approved scripts, and limited calendar visibility. They should not need commission, client financial, or organization configuration pages.

Permission test method

Create one test account per role. For each screen, test view, create, edit, delete, export, reassign, and administrative actions. Record expected and actual behavior. Do not test permissions while signed in as the master administrator.

5. Prepare and migrate data safely

Preserve the source

Export the original system before cleaning anything. Store a read-only copy with the date, source system, record count, and responsible person. Never clean the only copy.

Clean in this order

- 1 Remove empty rows and obvious test records.
- 2 Standardize names, phone formats, dates, countries, owners, products, and source names.

- 3 Identify duplicates using more than one key where possible.
- 4 Separate active, nurture, lost, invalid, client, expired, and archived records.
- 5 Add missing owners or place records into an explicit unassigned queue.
- 6 Add next actions only when they are supported; do not invent follow-up dates.
- 7 Map old stages to the new pipeline.
- 8 Mark sensitive columns that should not be imported.

Build the field map

Every source column needs a destination, transformation rule, owner, and validation test. If there is no safe destination, archive the data outside the CRM under the retention policy rather than dumping it into notes.

Run a sample import

Test 20 to 50 representative records before the full migration. Include duplicates, missing fields, international phone numbers, long names, expired records, multiple products, unusual dates, and every owner. Verify not only that records exist, but that users can work them.

Reconcile after import

Compare source and destination counts by category, not only the grand total. Check active leads, clients, renewals, owners, stages, sources, and records rejected by the import. Spot-check at least one record per owner and per stage.

6. Test complete CRM workflows

The system is ready only after role champions demonstrate end-to-end work using test data.

Required acceptance tests:

- Manager creates or imports a lead, assigns it, and sees it in reporting.
- Call Center user opens an assigned lead, logs an outcome, and schedules a callback.
- Agent sees the assigned record, updates the next action, advances the stage, and adds a note.
- Agent closes the opportunity and creates the client through the agreed process.
- Renewal date appears in the correct view and can be filtered.
- Leader sees only the intended team and can perform the intended coaching review.
- Manager verifies product, value, commission, report, export, and backup behavior.
- Unauthorized role attempts are blocked.
- Duplicate handling and lost-reason reporting work as designed.

Record each test with expected result, actual result, evidence, severity, owner, and retest status.

7. The 14-day implementation plan

Days 1-2 - decisions and ownership

- Appoint the implementation owner and role champions.
- Confirm CRM scope and system-of-record rules.
- Freeze stage, field, source, product, renewal, and ownership definitions.
- Confirm privacy, retention, access, and backup requirements.
- Publish the decision log and issue-escalation path.

Days 3-4 - configuration and permission testing

- Create users and reporting lines.
- Configure core fields, products, rates, goals, and stages.
- Test every role using separate test accounts.
- Confirm audit, export, backup, and account-recovery procedures.
- Fix critical permission defects before importing live data.

Days 5-7 - clean and migrate

- Export and protect source data.
- Clean, deduplicate, classify, and map.
- Import a representative sample and reconcile it.
- Obtain data-owner approval.
- Import the full approved set and produce an exception report.

Days 8-9 - workflow testing

- Execute every acceptance test with demo records.
- Test handoffs between Call Center, Agent, Leader, and Manager.
- Verify notifications and next-action behavior.
- Fix blockers and repeat failed tests.

Days 10-11 - role training

- Chapter 0 for every user.
- Chapter i as the CRM map.
- Chapter 1 for Managers.
- Chapter 2 for Leaders.
- Chapter 3 for Agents.
- Chapter 4 for Call Center staff.
- Each user completes one workflow in the training environment.

Day 12 - controlled pilot

Use a small team or a defined lead source. Run live work in Conquest, but keep the implementation owner available. Review missing data, unclear stages, permission problems, and slow steps at the end of the day.

Day 13 - stabilization

Fix only launch-critical problems. Do not redesign the entire system. Confirm the support channel, escalation rules, backup, export, and day-one report.

Day 14 - go-live and sign-off

- Announce the cutover time and the end of duplicate tracking.
- Confirm every active lead has an owner, stage, and next action.
- Confirm every user can sign in and perform their role workflow.
- Capture baseline adoption and pipeline metrics.
- Obtain sponsor, data owner, CRM administrator, and compliance sign-off.

8. Drive adoption after launch

Software adoption is a management process. Do not ask whether people like the CRM. Measure whether the required work is happening.

Daily 10-minute CRM huddle

- 1 Unassigned new leads.
- 2 Overdue next actions.
- 3 Qualified opportunities without a scheduled event.
- 4 Decision-pending records without follow-up.
- 5 Won records not converted to clients.
- 6 Renewals due without an owner or action.
- 7 Data or permission blockers.

Weekly 30-minute pipeline review

- Conversion by source and owner.
- Stage aging and stalled opportunities.
- Contact speed and attempt completion.
- Client conversion and renewal coverage.
- Loss reasons and data-quality exceptions.
- Coaching action for each person below process standard.
- One system improvement with an owner and due date.

Adoption scorecard

Track behavior, not logins alone.

Measure	Minimum standard	Owner
Active leads with owner	100%	Manager
Active leads with next action	95% or agency standard	Team Leader
Closed records with outcome reason	100%	Agent
Won records converted to client	100%	Agent and Manager
Renewals with dated action	Agency standard	Client owner
Critical issues resolved	Within agreed SLA	CRM administrator

9. Troubleshooting by category

Training problem

The user has permission, the workflow works, but the user does not know the next step. Solve with the role guide, a two-minute demonstration, and a repeated task using test data.

Permission problem

The correct user cannot access a required action, or can access something outside the role. Capture the account, role, page, action, time, and expected behavior. Escalate to the administrator.

Data problem

The record is missing, duplicated, mapped incorrectly, or owned by the wrong person. Trace it to source, migration batch, transformation rule, and current owner. Do not overwrite evidence before diagnosis.

Process problem

The software behaves as configured, but the agency has not decided who owns the task or what a stage means. Resolve the business rule first, then configure it.

Product defect

The approved workflow and permissions are correct, but the software behaves incorrectly. Record reproducible steps, expected and actual result, affected roles, screenshots without private data, severity, and business impact.

10. Launch assignment

- 1 Complete the system-of-record matrix.
- 2 Complete the role-permission matrix and test every role.
- 3 Complete the field-mapping workbook and reconcile a sample import.
- 4 Run every acceptance test and close all critical failures.
- 5 Publish the 14-day owner plan.
- 6 Run one daily huddle and one weekly pipeline review using CRM data.

7 Obtain written go-live sign-off.

The implementation is ready when a new lead can move from receipt to client and renewal without a private spreadsheet, unassigned handoff, or missing next action.

EDITABLE TEMPLATE PACK

Copy these into your working documents. Replace bracketed placeholders, obtain the required approval, and connect every live process to a CRM owner and field.

Template 1 - System-of-record matrix

Business object	Primary system	Required fields	Record owner	Backup/export	Notes
Lead	Conquest CRM	Source, owner, stage, next action	[Role]	[Method]	[Rule]
Opportunity	Conquest CRM	Stage, value, expected decision	[Role]	[Method]	[Rule]
Client	Conquest CRM	Product, status, responsible agent	[Role]	[Method]	[Rule]
Renewal	Conquest CRM	Renewal date, owner, next action	[Role]	[Method]	[Rule]
Signed documents	[Approved storage]	[Fields]	[Role]	[Method]	Do not duplicate unnecessarily
Accounting	[Accounting platform]	[Fields]	[Role]	[Method]	CRM may store reference only

Template 2 - Stage definition card

STAGE NAME: [Observable business state]
 PURPOSE: [Why this stage exists]
 ENTRY CONDITION: [What must already be true]
 REQUIRED FIELDS: [Fields that must be complete]
 REQUIRED NEXT ACTION: [Action and due-date rule]
 EXIT EVENT: [What moves the record forward or closes it]
 MAXIMUM AGE: [Agency standard]
 OWNER: [Role responsible]
 REPORTING CATEGORY: [Open / won / lost / invalid / nurture]

Template 3 - Role and permission test

Screen or action	Manager	Leader	Agent	Call Center	Expected result	Actual result	Owner
View assigned leads	Yes	Team only	Own only	Assigned only	[Result]	[Result]	[Name]
Reassign lead	Yes	[Policy]	No	No	[Result]	[Result]	[Name]
Export data	Restricted	No	No	No	[Result]	[Result]	[Name]
Edit rates	Restricted admin	No	No	No	[Result]	[Result]	[Name]
View commissions	Yes	Team policy	Own only	No	[Result]	[Result]	[Name]

Template 4 - Field mapping workbook

Source column	Example without private data	Destination field	Transform rule	Import?	Owner	Validation
[Old field]	[Demo value]	[CRM field]	[Format rule]	Yes/No	[Name]	[Test]
[Old stage]	[Demo stage]	Pipeline stage	[Mapping]	Yes	[Name]	Count by stage
[Old owner]	[Demo owner]	Record owner	[User mapping]	Yes	[Name]	Count by owner

Template 5 - Migration reconciliation

Category	Source count	Imported	Rejected	Duplicate/archived	Difference explained	Approved by
Active leads	[#]	[#]	[#]	[#]	[Reason]	[Name/date]
Nurture leads	[#]	[#]	[#]	[#]	[Reason]	[Name/date]
Clients	[#]	[#]	[#]	[#]	[Reason]	[Name/date]
Renewals	[#]	[#]	[#]	[#]	[Reason]	[Name/date]

Template 6 - User acceptance test

TEST ID: [UAT-001]
 ROLE: [Manager / Leader / Agent / Call Center]
 STARTING CONDITION: [Test user and demo data]
 STEPS:
 1. [Action]
 2. [Action]
 3. [Action]
 EXPECTED RESULT: [Observable result]
 ACTUAL RESULT: [What happened]
 EVIDENCE: [Safe screenshot or record ID]
 SEVERITY: [Critical / high / medium / low]
 OWNER: [Name]
 RETEST DATE: [Date]
 STATUS: [Pass / fail / blocked]

Template 7 - 14-day owner plan

Day	Deliverable	Owner	Reviewer	Due time	Evidence	Status
1	Scope and system ownership	[Name]	[Name]	[Time]	Decision log	[Status]
2	Stage and field definitions	[Name]	[Name]	[Time]	Approved map	[Status]
3	Users and roles	[Name]	[Name]	[Time]	Permission matrix	[Status]
4	Configuration test	[Name]	[Name]	[Time]	UAT results	[Status]
5-7	Data migration	[Name]	[Name]	[Time]	Reconciliation	[Status]
8-9	End-to-end testing	[Name]	[Name]	[Time]	Test pack	[Status]
10-11	Role training	[Name]	[Name]	[Time]	Completion list	[Status]
12	Controlled pilot	[Name]	[Name]	[Time]	Pilot report	[Status]
13	Stabilization	[Name]	[Name]	[Time]	Issue closure	[Status]
14	Go-live	[Name]	[Name]	[Time]	Signed checklist	[Status]

Template 8 - Daily CRM huddle

DATE: [Date] FACILITATOR: [Name]
 UNASSIGNED NEW LEADS: [# / owners assigned]
 OVERDUE NEXT ACTIONS: [# / owners]
 QUALIFIED WITHOUT APPOINTMENT: [# / owners]
 DECISION PENDING WITHOUT FOLLOW-UP: [# / owners]
 WON NOT CONVERTED TO CLIENT: [# / owners]
 RENEWALS WITHOUT ACTION: [# / owners]
 BLOCKERS: [Issue / owner / due time]
 TODAY'S ONE PROCESS PRIORITY: [Priority]

Template 9 - Weekly pipeline review

WEEK ENDING: [Date]

1. New leads by source and owner
2. Contact speed and contact rate
3. Qualified and appointment rates
4. Stage aging and stalled records
5. Win rate, value and loss reasons
6. New clients and renewals at risk
7. Data-quality exceptions
8. Coaching actions by owner
9. One CRM improvement, owner and due date

Template 10 - Issue report

TITLE: [Short observable problem]

CATEGORY: [Training / permission / data / process / product]

AFFECTED ROLE: [Role]

BUSINESS IMPACT: [What cannot be completed]

TEST RECORD: [Demo record only]

STEPS TO REPRODUCE: [Numbered steps]

EXPECTED RESULT: [Expected]

ACTUAL RESULT: [Actual]

FIRST SEEN: [Date/time]

FREQUENCY: [Always / intermittent / once]

SAFE EVIDENCE: [No private data]

OWNER: [Name]

TARGET DATE: [Date]

Template 11 - Go-live sign-off

- [] Scope and system-of-record rules approved
- [] Roles and permissions tested with separate accounts
- [] Backup and export tested
- [] Source data preserved
- [] Migration reconciled by category
- [] Critical workflows passed
- [] Every user completed role training
- [] Support and escalation path published
- [] Active leads have owner, stage and next action
- [] Rollback or continuity plan confirmed

EXECUTIVE SPONSOR: [Name/date]

IMPLEMENTATION OWNER: [Name/date]

DATA OWNER: [Name/date]

CRM ADMINISTRATOR: [Name/date]

COMPLIANCE REVIEWER: [Name/date]