CRM Governance Audit Worksheet

Executive Diagnostic Framework

By Kynetto

Purpose

This governance audit worksheet is designed to help executive leadership evaluate the structural integrity of their CRM system.

CRM platforms do not fail because of software limitations. They fail because governance standards are unclear, undocumented, or unenforced.

Use this worksheet to assess structural risk, forecast integrity, and long-term scalability readiness.

Section 1: Governance Structure & Ownership

1.1 Governance Model

☐ We have a formally defined CRM governance structure
☐ Governance roles are documented
☐ A cross-functional governance committee exists
☐ Governance meeting cadence is established (monthly/quarterly)
☐ Decision rights are clearly defined

1.2 Structural Ownership

☐ Pipeline stage definitions have assigned owners
☐ Required fields have documented ownership
☐ Segmentation logic has a defined authority
☐ Forecast methodology is formally approved
☐ CRM administration and governance are clearly separated

Section 2: Pipeline & Forecast Integrity

2.1 Stage Discipline

☐ Stage definitions are written and accessible
☐ Exit criteria are documented
☐ Stage skipping is restricted
☐ Required fields are enforced before stage movement

2.2 Probability & Forecast Standards

☐ Probability percentages are standardized by stage
☐ Commit criteria are documented
☐ Probability overrides require managerial review
☐ Weekly forecast review cadence exists
☐ Variance between forecast and actual is analyzed quarterly

Section 3: Permission Architecture & Data Control

3.1 Access Governance

☐ Role-based access tiers are clearly defined
☐ Only designated roles can modify pipeline stages
☐ Only designated roles can adjust probability logic
☐ Historical data edits are restricted
☐ Permission reviews occur annually

3.2 Data Integrity Protection

☐ Close dates require approval if changed late-stage
☐ Stale deal alerts are automated
☐ Stage aging thresholds are monitored
☐ Pipeline cleanup cadence is enforced

Section 4: Segmentation & Reporting Consistency

4.1 Segmentation Discipline

☐ Segmentation definitions are documented
☐ Enterprise vs SMB logic is standardized
☐ Product-line segmentation is consistent across departments
☐ Marketing and Sales definitions align
☐ Finance reporting aligns with CRM revenue logic

4.2 Metric Standardization

☐ Close rate calculation is standardized
☐ Sales cycle duration is consistently defined
☐ Pipeline coverage ratio is documented
☐ Executive dashboards are standardized
☐ Rep-specific dashboards do not override official reports

Section 5: Automation & Customization Governance

5.1 Automation Oversight

☐ All workflows have documented objectives
☐ Each automation has an assigned owner
☐ Automation review cadence exists
☐ Redundant workflows have been audited
☐ Probability logic automation is aligned to stage discipline

5.2 Customization Control

☐ New fields require business justification
☐ Custom objects follow naming standards
☐ Custom reports are reviewed before executive use
☐ Over-customization risks are evaluated annually

Section 6: Documentation & Change Management

6.1 Documentation Standards

☐ Stage definitions are documented
☐ Probability assignments are documented
☐ Dashboard definitions are documented
☐ Change logs are maintained
☐ Governance charter is written and accessible

6.2 Change Management

☐ Structural changes require formal approval
☐ Impact analysis is performed before modifications
☐ Mid-quarter changes are controlled

☐ Post-change validation reviews occur
☐ CRM structural changes are logged historically

Section 7: Scalability & Growth Readiness

7.1 Scale Readiness

☐ Governance processes would support 2x headcount
☐ Segmentation model can support new product lines
☐ Reporting architecture can handle expanded pipeline volume
☐ Forecast methodology scales across multiple teams
☐ M&A integration playbook exists

7.2 Transition Resilience

☐ Leadership transitions would not disrupt CRM structure
☐ Compensation changes do not compromise forecast integrity
☐ Territory realignments follow structured pipeline transfer protocols

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Scoring Model

Assign:
• Yes = 2 points
• Partial = 1 point
• No / Unknown = 0 points

Total Possible Score: 100+

Governance Maturity Interpretation

80–100+ Points
Strong governance discipline. Structural integrity is likely preserved.

60–79 Points
Moderate governance. Some structural risks exist. Audit reinforcement recommended.

40–59 Points
Governance gaps present. Forecast reliability and reporting alignment may be at risk.

Below 40 Points
High structural decay risk. Immediate governance review recommended.

Executive Reflection Questions

1. Where are the highest concentrations of “Partial” or “No” responses?
2. Does forecast accuracy depend on individual behavior rather than structural discipline?
3. Are reporting disputes common between Sales and Finance?
4. Could your CRM support a revenue doubling without structural strain?

Closing Note

CRM governance is not administrative overhead. It is infrastructure discipline.
Forecast reliability, executive trust, and scalable growth are outcomes of structural clarity.

Design governance with intention. Review it regularly. Enforce it consistently.

About Kynetto
Kynetto is a strategic advisory platform focused on CRM architecture, marketing automation systems, and revenue infrastructure design for emerging and mid-market organizations.