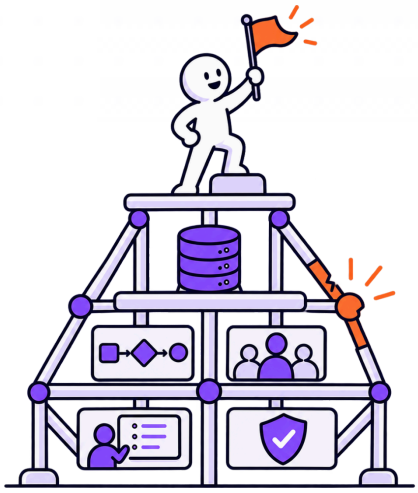
CRM rollout: the internal cost nobody budgets for

A readiness check and an effort calculation, before you decide



Inside:

Why internal effort appears in no proposal · Readiness check, dimensions 1 and 2 · Readiness check, dimensions 3 and 4 · Scoring: three readiness levels

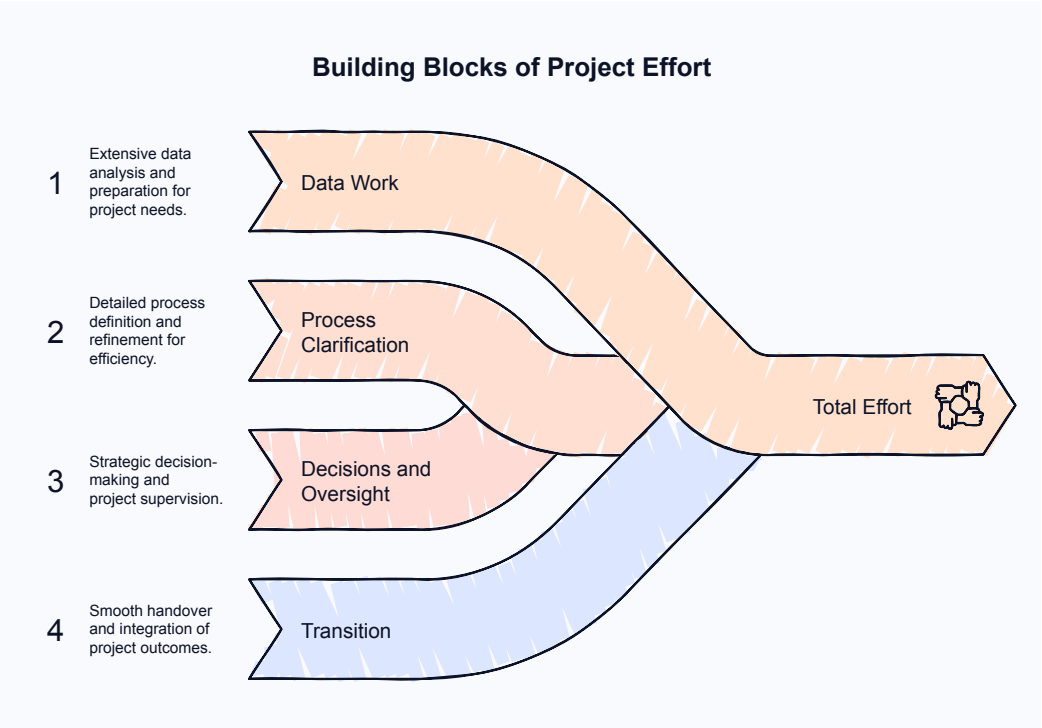
17 PAGES TO PRINT AND FILL IN · 4 DIAGRAMS

AN OPERATING PARTNER FOR REVENUE SYSTEMS · HUBSPOT DIAMOND PARTNER

Free 60-minute CRM Assessment pages.thesalesplaybook.com/meetings/erik-steffen/-crm-assessment-call

Contents

Every page stands on its own. If you are short on time, jump straight to the step where it is stuck at your end.



SKETCH · THE EFFORT CALCULATION

What this is for, and what it is not

A proposal for a CRM rollout quantifies the vendor's work. It does not quantify your own team's hours, and in most projects that is the larger line item.

This is a tool, not an explainer. It contains four questionnaires to fill in, a calculation with your own fields, and two lists that get built before go-live. If you want to understand *why* CRM projects fail and what a rollout sequence looks like, read the article. If you want to know what **your** project costs internally and whether **your** company is ready for it, fill this in.

What you end up with

A readiness level on a three-step scale, an effort figure in person-days for your own team, a list of the process pieces that will break at go-live, and a decision between repairing and rebuilding.

Time required: 90 minutes with three people. Filling it in alone produces a readiness score that is too good. The four dimensions cover different areas, and everyone overestimates their own.

Who should be in the room: the person who runs sales, the person who maintains the data today, and the person allowed to make decisions in the project. Without the third, the result is an estimate with no commitment behind it.

One figure this document deliberately does not give you: a benchmark. There is no number here of the form "a CRM rollout costs X internal days." Those figures depend on data quality, team size and system landscape, and an averaged number would be wrong in both directions. The calculation from page 8 gets filled with your values.

NEXT DECISION

which CRM fits which revenue model

CRM for professional services

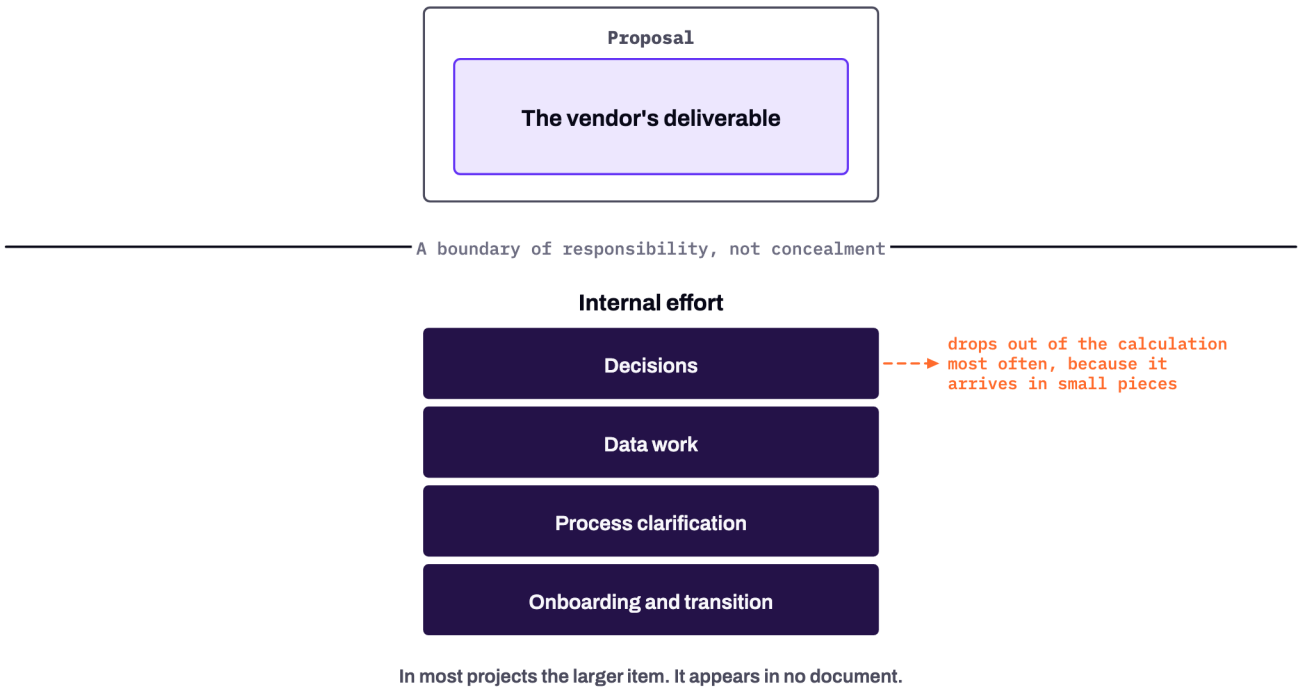
DOCUMENTED · WORKIST

Workist saves €200k every year after moving from Salesforce to HubSpot, migrated in under three months. Read the case study

Why internal effort appears in no proposal

It is not there because it is not part of the vendor's deliverable. That is not concealment, it is a boundary of responsibility. The effect is still that a project gets decided on half a cost picture.

GRAPHIC G1



Four internal line items, all of them nameable in advance:

ITEM	WHO	WHEN
Decisions	sales leadership, management	across the whole project, in short blocks
Data work	whoever maintains the data today	front-loaded, concentrated, usually underestimated
Process clarification	the people who execute the process	front-loaded, in workshops
Onboarding and transition	the whole team	after go-live, distributed

The item that most often drops out of the calculation is the first. Not because it is large, but because it arrives in small pieces: a quarter hour here, a follow-up question there. If those pieces are not planned, they slip, and a project waiting on decisions extends by the waiting time, not the working time.

How to tell in advance that it will get expensive: if the question "who decides which fields come across" does not produce a single named person. Then every detail question becomes an alignment exercise, and alignment exercises are the real time sink in CRM projects.

The question before the calculation, and it is a bigger one

Manuel Hartmann, founder and CEO of SalesPlaybook, writes in his LinkedIn newsletter *Diary Of A CRO* that the question "do we need a CRM" or "which CRM" is almost always framed too small. The larger question, he argues, is not "Salesforce or HubSpot" but whether the system sees the journey from the first impression to the paid invoice. (Read the issue, in German)

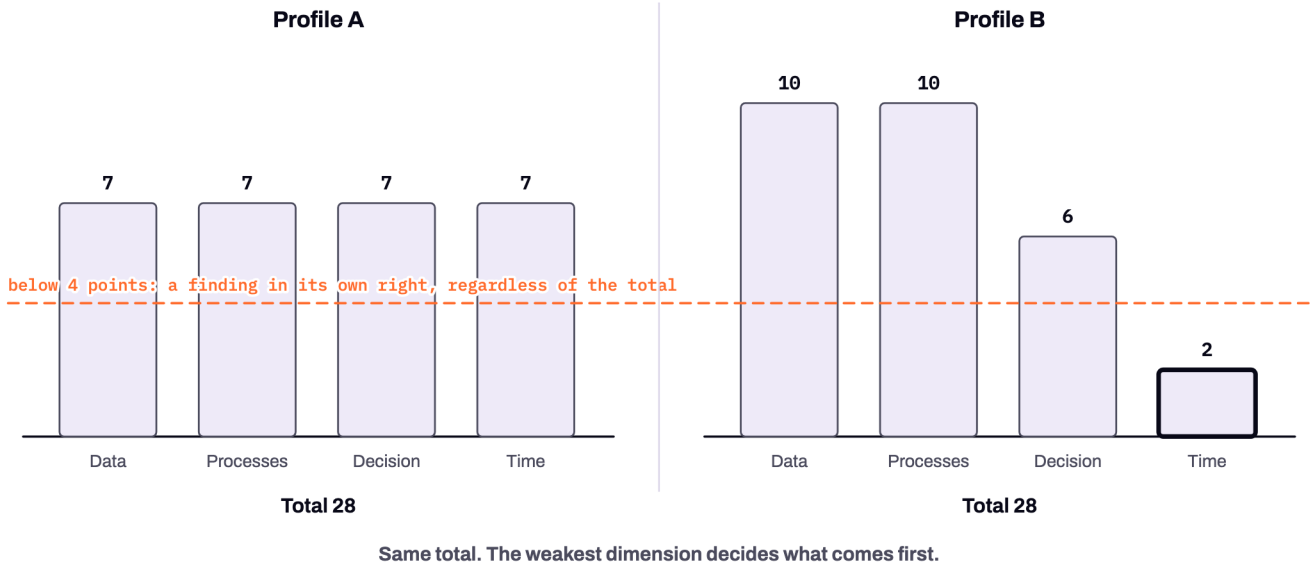
For this check that has two consequences. The effort calculation from page 8 gets measured against the scope you actually want covered, not the scope in the proposal. And a readiness level that looks only at sales says little about a system that will later have to carry marketing and service too.

> GO DEEPER
>
> what a CRM rollout really costs

Readiness check, dimensions 1 and 2

Twenty questions across four dimensions. Answer yes, partly or no. Scoring: yes = 2, partly = 1, no = 0. Maximum 40 points.

GRAPHIC G2



Same total. The weakest dimension decides what comes first.

Dimension 1 · Data quality

	QUESTION	YES / PARTLY / NO
1.1	Is there exactly one place where a customer exists as a record?	
1.2	Can anyone say how many duplicates the current system holds?	
1.3	Are the fields sales actually uses named and bounded?	
1.4	Are there required fields that are consistently filled?	
1.5	Is it clear which historical data must be retained for legal reasons?	

On 1.2, because the question gets misread: the exact number is not what is being asked. What is being asked is whether anyone has looked. "I would guess a few" is a no.

Dimension 2 · Process documentation

	QUESTION	YES / PARTLY / NO
2.1	Is the path from lead to customer described in stages everyone reads the same way?	
2.2	Is there a written rule for when a stage is reached?	
2.3	Are the automations in the current system listed?	
2.4	Does anyone know which forwarding and routing rules are active?	
2.5	Are there reports that are actually used for decisions today?	

2.3 and 2.4 are the two questions projects later snag on. They sit here rather than in a technical appendix for that reason. Anyone answering them with no has the section on page 13 to work through before naming a go-live date.

Readiness check, dimensions 3 and 4

Dimension 3 · Decision capability

	QUESTION	YES / PARTLY / NO
3.1	Is there a named person allowed to settle detail questions alone?	
3.2	Is a budget range approved, not merely discussed?	
3.3	Is it decided what gives way in a squeeze: date, scope or budget?	
3.4	Is there a fixed weekly slot for project decisions?	
3.5	Is management formally involved at one defined point?	

3.3 has the largest leverage of any question in this document. A project where all three variables are fixed has no room left to decide anything when something unexpected happens, and something unexpected happens. Which variable gives way is best decided before the case arises.

Dimension 4 · Available internal time

	QUESTION	YES / PARTLY / NO
4.1	Is the data work assigned to a named person as a task?	
4.2	Has that person been relieved of other work for it?	
4.3	Is workshop time blocked in calendars, not just verbally agreed?	
4.4	Does go-live fall outside your own peak season?	
4.5	Is there a second person who could take over the data work?	

4.2 often gets answered "partly," and that is usually a no. Relief means another task has demonstrably been dropped or moved. "She will manage alongside" is not relief, it is the assumption that the data work is small, and that assumption is the most common cause

of delay.

4.5 is the single-point-of-failure question. In many projects the data work depends on one person who is the only one who understands the legacy system. If they are unavailable, the project stops.

Scoring: three readiness levels

Add the points. Maximum 40.

POINTS	LEVEL	WHAT IT MEANS FOR THE TIMELINE
30 to 40	**ready**	The vendor's timeline is realistic. Internal effort lands in the planned range
18 to 29	**conditionally ready**	The preparation on page 13 belongs before kickoff. Without it, go-live moves, not the work
below 18	**not ready**	Starting in this state generates effort that has nothing to do with the CRM

More important than the total is the weakest dimension. Four times 7 gives the same total as 10, 10, 6, 2, and those two situations are completely different. Any dimension below 4 points is a finding in its own right, regardless of the total.

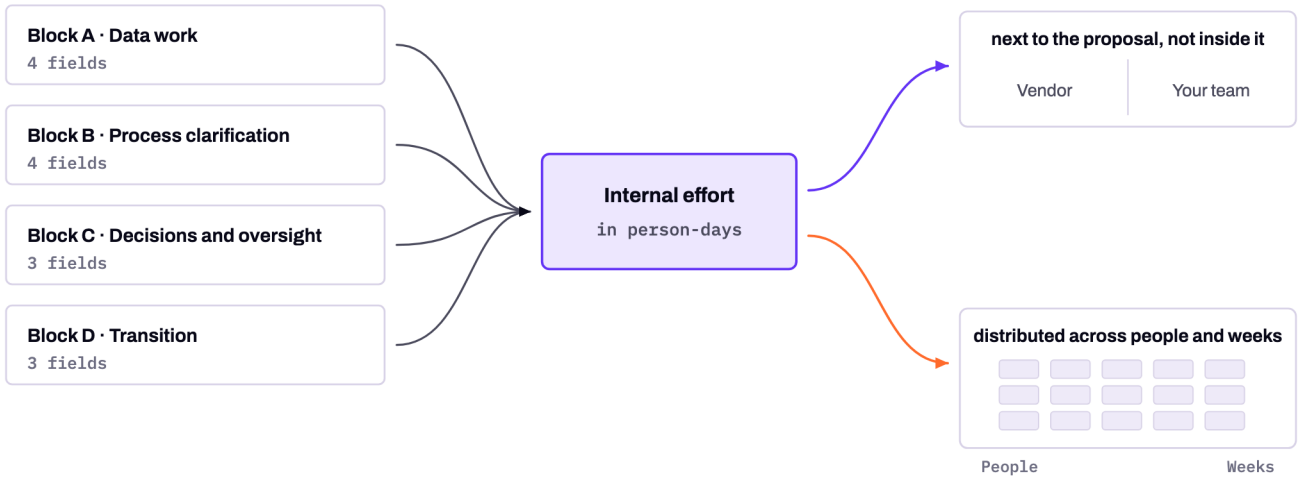
WEAKEST DIMENSION	WHAT COMES FIRST
Data quality	An inventory before system selection. A new system reflects old data unchanged
Process documentation	Two workshops that name the stages. Without them, the process gets invented inside the tool
Decision capability	Name one person and equip them. That is one hour and the cheapest measure in this document
Available time	Move the date or cut the scope. Either beats losing both

What a low readiness score does not mean: that the project should not happen. It means the order is different from the one that was planned.

The effort calculation, part 1: the fields

This calculation gives you a figure in person-days for your own team. It is deliberately coarse: it should make the order of magnitude visible, not replace a project plan.

GRAPHIC G3



The readiness level corrects the figure upward. It does not replace it.

Block A · Data work

FIELD	YOUR VALUE
A1 · Number of records to be migrated	
A2 · Number of object types (contacts, companies, deals, others)	
A3 · Number of source systems	
A4 · Days for inventory and cleanup (estimate)	

On A4: the estimate comes from the person who maintains the data today, not from project leadership. The gap between those two estimates is routinely a factor of two.

Block B · Process clarification

FIELD	YOUR VALUE
B1 · Number of processes to run in the new system	
B2 · People per workshop	
B3 · Workshops per process (typically 1 to 2)	
B4 · Half-days per workshop, including follow-up	

Source · creating and editing properties · knowledge.hubspot.com
Source · creating custom objects · knowledge.hubspot.com

GO DEEPER

which fields have to be mandatory

NEXT DECISION

when a custom object is necessary

The effort calculation, part 2: oversight and transition

Block C · Decisions and oversight

FIELD	YOUR VALUE
C1 · Project weeks per the vendor's proposal	
C2 · Hours per week for decisions and questions	
C3 · Number of people regularly involved	

On C2: three decisions consume these hours. They look small and cost the most, because a project keeps reopening them for as long as they stay undecided.

1 · Which fields are genuinely required? A required field assumes the person filling it in has the answer. Make a date required so that estimate can later be measured against reality, and the delivering team does not know that date, and the field still gets filled: otherwise the system will not let anyone through. The result is not better reporting. It is reporting built on numbers somebody typed in to move on.

2 · At which stage does the record appear in the second system? Create it late and unqualified items stay out. Create it immediately and both systems share a reference number early. Both are defensible. The choice turns on whether junk data or double entry is the bigger risk in your setup, not on what the original concept said.

3 · Do you decide at a table or on a live record? A list of seventy fields cannot be judged in a workshop. A narrow test system that models the one contested decision can be. That is why C2 lands at two hours in one project and eight in the next.

Block D · Transition after go-live

FIELD	YOUR VALUE
D1 · Number of people who will work in the system	
D2 · Onboarding hours per person	
D3 · Weeks at reduced output after go-live	

On D3: this value is almost always set too low, because it gets treated as a training question. It is a habit question. The old motions are automatic, the new ones are not, and that takes longer than a training session.

NEXT DECISION

onboarding direct or through a partner

The effort calculation, part 3: the formula

Data work = A4

Process clarification = (B1 × B3 × B4 × B2) ÷ 2

Oversight = (C1 × C2 × C3) ÷ 8

Transition = (D1 × D2) ÷ 8

Total internal effort in person-days = data work + process clarification + oversight + transition

Dividing by 8 converts hours to days. Dividing by 2 converts half-days to days.

A worked example

The values below are invented and illustrate the arithmetic only. They are not a benchmark and not an experience figure.

A4 = 12 days

B1 = 5 processes · B2 = 4 people · B3 = 2 workshops · B4 = 1 half-day

C1 = 10 weeks · C2 = 3 hours · C3 = 2 people

D1 = 15 people · D2 = 4 hours

Data work = 12

Process clarification = (5 × 2 × 1 × 4) ÷ 2 = 20

Oversight = (10 × 3 × 2) ÷ 8 = 7.5

Transition = (15 × 4) ÷ 8 = 7.5

Total = 47 person-days

What to do with the figure

Put it next to the proposal, not inside it. Two columns: what the vendor costs, what your own team is committing. Only that comparison is a decision basis.

And distribute it across people rather than leaving it as a total. 47 days across two people over ten weeks is a little over two days per person per week. That is the number somebody has to approve, and it is more concrete than the total.

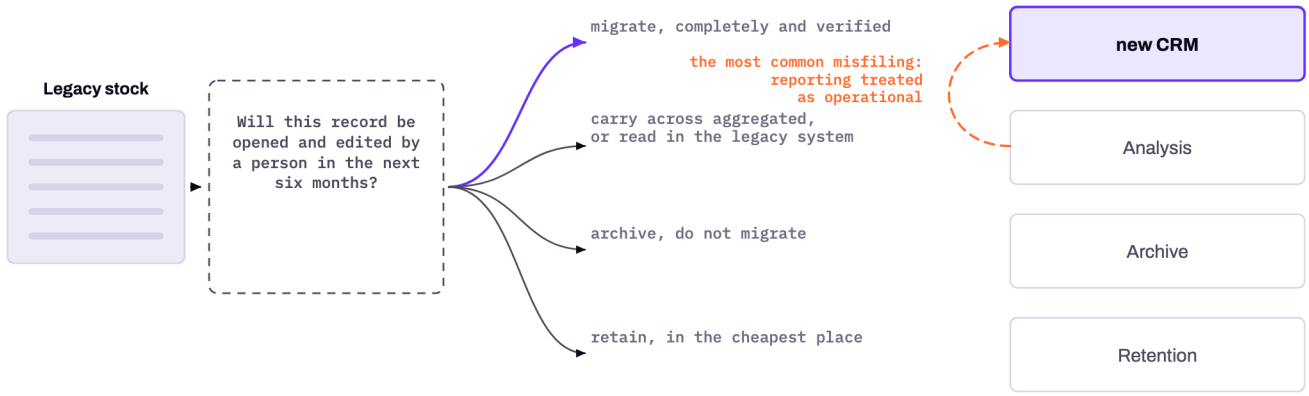
The readiness level corrects the calculation. At "conditionally ready" the actual effort runs above the calculated figure, because preparation is missing and then happens inside the project. At "not ready" the calculation does not hold, because too many inputs are estimated rather than measured.

Data separation: what actually has to move

Most migrations snag on the expectation that every legacy process and every legacy record comes along. Separating means migrating less, and going live sooner.

EVIDENCE [what really breaks when moving off Excel]

GRAPHIC G4



Four categories, four decisions:

CATEGORY	WHAT BELONGS IN IT	DECISION
Operational	data worked with tomorrow: open deals, active contacts, live tasks	**migrate**, completely and verified
Reporting	data needed for analysis but not for the work	**carry across aggregated**, or read in the legacy system
Historical	closed items with no operational relevance: old deals, inactive contacts	**archive**, do not migrate
Legal	what must be retained regardless of usefulness	**retain**, in the cheapest place, not the CRM

The category most often misfiled is reporting. It gets treated as operational, because a report without history looks incomplete. The result is a migration that carries three times the records and a verification effort that rises accordingly.

The question that settles it: will this record be opened and edited by a person in the next six months? If no, it is not operational, however often it appears in a report.

You have your number. Now what?

An effort figure answers what it costs. It does not answer whether the project is your largest lever. In a free 60-minute CRM Assessment we go through your completed check and tell you whether the timeline holds and what comes first. Including when the answer is that you do not need a partner yet.

pages.thesalesplaybook.com/meetings/erik-steffen/-crm-assessment-call · no pitch, an honest assessment

Source · importing objects · knowledge.hubspot.com
Source · managing duplicate records · knowledge.hubspot.com

GO DEEPER

data import with clean associations

Doing the separation

The order matters:

1. **List object types**, not records. Contacts, companies, deals, quotes, tasks, tickets, custom objects.
2. **Populate the four categories per object type.** An object type almost always spreads across several categories.
3. **Define a criterion for "operational" that a machine can apply.** "Last activity within 12 months" is applicable. "Important" is not.
4. **Count the volumes before deciding.** A category holding the bulk of all records is cut wrong.
5. **Ask the responsible person for retention periods** and record them in writing. It is the one category where guessing is a legal risk.

Fill in

OBJECT TYPE	OPERATIONAL	REPORTING	HISTORICAL	LEGAL	CRITERION FOR "OPERATIONAL"
Contacts					
Companies					
Deals					
Others					

What this table is worth in a vendor conversation: a vendor who receives a completed version can name a defensible scope. Without it they estimate, and estimates are routinely what migration disputes are made of.

The three mistakes this table prevents:

Taking everything across because deleting feels wrong. A full legacy stock in the new system does not only cost migration effort. It costs trust afterwards, permanently: anyone who hits dead records in the first month stops believing the fresh data too.

Classifying historical data as operational because somebody "might need it some day". That case is exactly what the reporting category is for, and it needs no maintenance.

Guessing the retention period. It is the one of the four categories where a wrong assumption is a risk rather than an inconvenience. It gets asked and recorded in writing, with a name and a date.

GO DEEPER

data hygiene that survives turnover

The process pieces everyone assumed were included

This is the list that gets built before go-live and that most projects do not have.

The pattern: part of the scope counts as obviously included without being recorded as its own item. Typically automations, forwarding or routing rules that ran silently before the switch and have to be rebuilt after it. If exactly that part breaks at go-live, it hits operations immediately: processes that ran by themselves have to be handled manually, often for weeks.

Why nobody notices: a working automation is invisible. It has no owner, because it creates no work, and it appears in no process description, because it is not a process but a setting.

Building the list

Four sources, in this order:

SOURCE	WHAT IS IN THERE
The automation overview in the legacy system	the active rules, usually more than expected
Mailboxes that receive something automatically	notifications whose sender nobody can identify
Asking the team: what happens by itself today?	the rules the system does not track as rules
Forwarding at domain or mailbox level	sits outside the CRM and gets forgotten regularly

Fill in

WHAT RUNS AUTOMATICALLY TODAY	WHO NOTICES IF IT STOPS	COMES ACROSS?	WHO REBUILDS IT

The third column is the actual work. "Comes across" is a decision, and it belongs in the project scope in writing. A scope change agreed verbally is the documented cause of failure in this class of problem.

The second column is the check on whether the row is real. If nobody notices it stopping, it is not needed. Then it does not belong in scope, it belongs switched off.

What typically breaks at go-live

Four patterns. All four are visible in advance, and all four have a check that runs before go-live.

WHAT BREAKS	HOW TO SPOT IT IN ADVANCE	CHECK BEFORE GO-LIVE
Lead forwarding	the page 13 list is empty or short	create a test contact, follow where it lands
Notifications	nobody can say who gets informed when	trigger a test case, check who receives an email
Reports decisions depend on	question 2.5 answered "partly"	rebuild the most important report, compare figures
Data quality in practice	required fields were not enforced in the legacy system	run a week in parallel, measure fill rates

The fourth is the most unpleasant, because it only becomes visible after go-live. A field that was optional in the legacy system does not suddenly get filled in the new one. Introducing required fields without measuring the fill rate first produces either empty fields or placeholder values, and placeholders are worse than gaps.

And the rule for when something breaks anyway, because that is the normal case rather than the exception:

> Problem first, responsibility second.

When a process fails after go-live, the conversation moves quickly to what was contractually agreed. To the vendor that feels like necessary clarification. To the customer it feels like a change of subject, away from the outage. If responsibility gets discussed first, the trust damage has usually already happened, regardless of how justified the contractual point is.

This works in both directions. As the customer it is also the faster order: first settle how operations continue, then settle who pays for it.

Source · understanding lifecycle stages · knowledge.hubspot.com

Repair or rebuild

This question arises when a CRM already exists and does not hold. It routinely gets answered "rebuild" too quickly, because a rebuild sounds clean.

	REPAIR	REBUILD
Fits when	the data structure is sound at its core and processes are missing	the object structure itself is wrong
Takes	in stages, alongside operations	concentrated, with a cutover point
Risk	some legacy weight stays	operations depend on the date
Internal effort	distributed, but longer	concentrated, but shorter

The question that decides it: is the problem that things are configured wrongly, or that they are modelled wrongly? Configuration can be repaired. A data model in which the central business relationship cannot be represented cannot.

Why freezing sales for a proper rebuild backfires: sales carries on regardless, just outside the system. At the end of the rebuild there are weeks of activity sitting in spreadsheets and mailboxes, and the migration starts again with worse data than before.

What works instead is a staged repair: one self-contained area per stage, usable when that stage ends. It costs more total effort and less risk, and it keeps operations running.

GO DEEPER

repair or rebuild, as a decision frame

Checklist before deciding

- [ ] Readiness check filled in by three people together
- [ ] Weakest dimension named, not just the total
- [ ] Any dimension below 4 points: preparation planned before kickoff
- [ ] Effort calculation filled with your own values, not the example
- [ ] A4 estimated by the person who maintains the data today
- [ ] Internal effort distributed across people and weeks, not left as a total
- [ ] Two columns side by side: vendor cost and internal commitment
- [ ] Data separation completed per object type, volumes counted
- [ ] Criterion for "operational" written so a machine can apply it
- [ ] Retention periods obtained in writing from the responsible person
- [ ] List of assumed-included process pieces built
- [ ] Every row on it decided and recorded in writing: does it come across
- [ ] Four go-live checks scheduled
- [ ] Decided what gives way in a squeeze: date, scope or budget
- [ ] With an existing CRM: repair or rebuild decided with a reason

If the list of assumed-included process pieces is empty, it is not finished. In every system that has grown, something runs automatically that appears in no documentation. An empty list means the four sources on page 13 were not consulted.

Next step

The two places this document most often stalls: question 3.1, because no single person is allowed to settle detail questions, and the list on page 13, because the legacy system does not display all of its automations.

Both are solvable, and both are cheaper before kickoff than after.

Where this document reaches its limit: it quantifies the effort and tests readiness. It does not answer whether a CRM project is your largest lever at all. If your pipeline is thin, a clean CRM changes nothing about that, and pipeline generation is the closer lever.

In a **free 60-minute CRM Assessment** we go through your completed readiness check and tell you whether the timeline holds, what comes first, and whether repair or rebuild is the right answer. Including when the answer is that you do not need a partner yet.

Free, 60 minutes, no pitch, an honest assessment of whether there is a fit.

WHO YOU WILL MEET IN THE CRM ASSESSMENT

Erik Plischke

HubSpot Implementation Specialist · SalesPlaybook

Book your free 60-minute CRM Assessment → pages.thesalesplaybook.com/meetings/erik-steffen/-crm-assessment-call

Fill in the self-assessment first → form.jotform.com/240112515833345

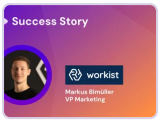
Sources quoted

The statements quoted verbatim come from the public LinkedIn newsletter *Diary Of A CRO* by Manuel Hartmann, founder and CEO of SalesPlaybook (https://www.linkedin.com/newsletters/diary-of-a-cro-7463115808336986112/). The issues are in German:

- "Blind bis zum Deal und nach dem Closing: Wieso ein CRM 2026 mehr leisten muss" · https://de.linkedin.com/pulse/blind-bis-zum-deal-und-nach-dem-closing-wieso-ein-crm-manuel-hartmann-zsbhe

Objections quoted verbatim come from our own project conversations and are anonymised: no client name, no industry, no figures.

DOCUMENTED OUTCOMES · 75 SUCCESS STORIES



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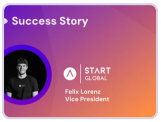

HUBSPOT CRM · START GLOBAL · LESS THAN 3 MONTHS

START GLOBAL turns a fragmented HubSpot setup into a clean, sustainable CRM system

HUBSPOT CRM · MÖHRLE HAPP LUTHER · 3 MONTHS

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SalesPlaybook designs, builds and operates Pipeline Generation, HubSpot CRM and Revenue Enablement as one connected revenue system. An operating partner for revenue systems, HubSpot Diamond Partner, working with B2B technology companies with 25 to 500 full-time employees in the DACH region.

A workbook by SalesPlaybook AG

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