CRM Usage Policy

Template edition 2.0 | Developed by CRM Switch

Policy owner	*[Name, title]*
Effective date	*[Date]*
Version	*[1.0]*
Review cycle	*[Annual]*
Approved by	*[Name, title]*

Text shown in *italics inside square brackets*, on a shaded background, marks a section you need to complete or adapt before publishing this policy. Delete any section that does not apply to your organization and renumber the rest.

About this document. A CRM usage policy is a written document stating who must use a company's CRM system, what they are required to record in it, and when. This template is published by CRM Switch and is free to adapt. Source: https://crmswitch.com/crm-value/crm-usage-policy/

Contents

1. Purpose

To communicate clear expectations of CRM usage within the company, ensuring consistency, reliability, and adoption.

2. Scope

This policy applies to all divisions and to every employee, contractor, and partner who has been granted a CRM login.

- *[Name any division, region, or user group that is exempt, or state that no exemptions apply.]*

3. Guiding Principles

The CRM is our main repository for all Leads, Opportunities, and sales interactions. It will be used as the main tool for all customer-facing associates to effectively sell, service, and communicate with external parties related to our sales efforts.

When in doubt, let the following guide you:

> *"If it is not in CRM, it doesn't exist."*

4. Policy Details

4.1 Managing Contact Information

The CRM will provide the company with a comprehensive view of our knowledge of, relationship to, and interactions with both contacts and the organizations with which we do business. We will create and maintain up-to-date Account and Contact information for every organization we interact with.

4.2 Tracking Communications

To better service our customers and partners, and to give our associates a 360-degree view of each customer, we will:

- Document any meaningful or initial communication with any customer, dealer, or partner in the CRM, including meetings, emails, text messages, and phone calls.
- Link or relate all documented communication to the appropriate Lead, Contact, or Opportunity.
- Memorialize relevant internal communications using either chat or email.

4.2.1 CALLS

Various channels are used to communicate with customers and partners. For the sake of posterity and internal alignment, we must capture key communications into the corporate memory. For phone, text, and other non-email correspondence:

- Record all meaningful non-email communications using the CRM's Log a Call feature.
- The internal collaboration feed may also be used to memorialize communications with internal associates.

4.2.2 MEETINGS

Meetings with customers and partners are a critical component of our sales process. The information gathered often provides the roadmap for forging stronger relationships and winning new business. These meetings also surface market feedback that helps others in the organization spot trends, identify new opportunities, and improve our products and services.

- For all meetings between reps and customers, we will log Call Reports capturing the participants, topics covered, issues or requests raised, and any action items for follow-up.

4.3 Generating Quotes

Quotations play an important role in both facilitating sales and giving the company insight into the performance of its products and partners. Because we sometimes sell through reps or distribution, our visibility into channel performance, market penetration, and won or lost deal status can be indirect. Much can be inferred from the type, origin, and flow of the quotes we receive. Ensuring that all Quotes are captured, tracked, and dispositioned is therefore key to good decision making.

- All domestic product quotations must be created in the CRM.
- Where approvals are required, they will be tracked in the CRM.

4.4 Managing Opportunities

Opportunities are valuable data points that shape the sales pipeline and give visibility into sales prospects. Each opportunity takes a different shape and requires a different level of coordination.

4.4.1 OPPORTUNITY MAINTENANCE

- [Regional Managers] will take the primary role of tracking their business, ensuring it is passed to the appropriate [distributors], and confirming that end users receive the service and support they expect.
- All Opportunities will be updated weekly with a clear Next Step and a realistic Close Date.

4.4.2 DISPOSITIONING OPPORTUNITIES

- When an order is received, the [Inside Sales] team will update the corresponding Opportunity stage to Closed/Won and record the PO number on the Opportunity.
- On learning that an Opportunity is lost, the sales team will document the Lost Reason and note any observations about how to improve our chances on similar future prospects.

4.5 Service Management (Cases)

Some divisions will use the CRM Case system to document product performance and issues reported by our customers, whether warranty or non-warranty.

- All relevant communications with the customer on a Case must be documented in the CRM.
- Case statuses are to be monitored regularly so that open and outstanding Cases are followed up and customer satisfaction levels are maintained.
- Case documentation, including the problem explanation, interaction history, and resolution, should be thorough, detailed, and clear. Photos from the customer should be attached whenever they can reasonably be obtained.

4.6 AI, Automation, and Data Integrity

AI note-takers, automated email logging, and data enrichment tools can add volume to the CRM without adding accuracy. A human remains accountable for every record these tools touch.

- The record owner is responsible for reviewing AI-generated call summaries and meeting notes before they are relied on for a forecast or a customer commitment.
- AI-generated content must be labeled as such and must never replace a required field, such as Next Step, Close Date, or Lost Reason.

> - *[State whether AI note-takers and meeting assistants may join customer calls, and what consent or notice is required first.]*
> - *[List the fields that automation and enrichment tools are permitted to create or overwrite.]*

5. Roles and Responsibilities

Describe who is accountable for each of the following:

- *[Role of the CRM Administrator]*
- *[Role of the CRM Ambassadors]*
- *[Role of the Steering Committee]*
- *[Role of front-line managers in reviewing data quality]*

6. Data Ownership and Confidentiality

- *[Define data ownership rules.]*
- *[Specify levels of data confidentiality.]*
- *[Outline procedures for handling sensitive information, and name any category of personal data that must never be stored in the CRM.]*

7. Restrictions and Prohibited Content

- *[List restrictions and prohibited actions, such as exporting data without authorization, using CRM records for personal purposes, or recording inappropriate language in a customer-visible field.]*

8. Related Documents

- Acceptable Use Policy

- *[Insert work instruction documents, data entry standards, and any vendor AI or sensitive data terms that apply.]*

9. Acknowledgment

I have read this CRM Usage Policy, I understand what is expected of me, and I agree to follow it.

Employee name and signature	Role / department	Date

Version History

Version	Date	Author	Notes
[1.0]	[Date]	[Author]	[Initial version adopted from the CRM Switch template]