FREE FIELD SHEET · Nº 005
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KEYWORD
CRM

THE CUSTOM CRM SPEC

What to decide before anyone quotes you a price

CHECKS	DO FIRST	PARTS	COST
39	8	7	Free



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Off-the-shelf CRMs fail because they model somebody else's sales process. Custom ones fail because nobody wrote the process down first. This is the document that prevents both, fill it in before you talk to any developer.

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TICK IT ON YOUR PHONE
youtube.hamzajameel.com/free/CRM

PART 1 OF 7 — 4 CHECKS

The decision itself

Build only if you can point at a specific thing your process does that the off-the-shelf options genuinely cannot.

- [ ] 1.1 DO FIRST

Name the thing standard CRMs cannot do for you

If you cannot, buy one. Custom is more expensive forever, not just to build.

- [ ] 1.2

Count the people who will use it daily

Under five, adoption is a conversation. Over twenty, it's a project with training.

- [ ] 1.3 DO FIRST

Confirm who owns it after launch

Custom software without an owner becomes legacy software in about six months.

- [ ] 1.4

Budget for year two, not just the build

Rule of thumb: ongoing is 20-30% of build cost annually.

PART 2 OF 7 — 6 CHECKS

Map the actual process

Write what happens today, not what should happen. The gap between those two is where every failed CRM project lives.

- [ ] 2.1 DO FIRST

Every stage a deal passes through, in your words

- [ ] 2.2

What has to be true to move from each stage to the next

This becomes validation. Vague stages produce a pipeline nobody trusts.

- [ ] 2.3

Who is responsible at each stage

☐ 2.4

Typical time in each stage

Becomes your stalled-deal alerts later.

☐ 2.5

What happens when a deal goes backwards

Most specs ignore this and every real pipeline does it.

☐ 2.6

The process for a lost deal

Reason codes here are where your best marketing insight comes from.

PART 3 OF 7 — 6 CHECKS

Data model

☐ 3.1

The objects you need: contact, company, deal, and what else

Resist adding objects you cannot name a report for.

☐ 3.2 DO FIRST

Required vs optional fields, decided deliberately

Every required field is a small tax on every user, every time.

☐ 3.3

Which fields are picklists, and the exact options

Free text where a picklist belongs makes reporting impossible later.

☐ 3.4

How duplicates are prevented and merged

Decide now. Retrofitting deduplication onto dirty data is painful.

☐ 3.5

What happens to a contact who leaves their company

☐ 3.6

Retention and deletion policy

Especially if you hold data on EU or UK individuals.

PART 4 OF 7 — 7 CHECKS

Integrations

Each one is a commitment to maintain something you do not control.

☐ 4.1

Email, two-way sync or logging only?

Two-way sync is significantly more work and the commonest scope surprise.

☐ 4.2

Calendar and meeting booking

☐ 4.3 DO FIRST

Website forms into the CRM, with source attribution intact

☐ 4.4

Ad platform data, which campaign produced which deal

Without this you are optimising ad spend against platform-reported conversions instead of revenue.

☐ 4.5

Accounting or invoicing

☐ 4.6

WhatsApp or the channel your market actually uses

In the GCC, ignoring WhatsApp makes the CRM incomplete in practice.

☐ 4.7

For every integration: what happens when it fails?

PART 5 OF 7 — 5 CHECKS

Automation

☐ 5.1

List each automation, and what it does when conditions are unclear

Ambiguity in automation produces silent wrong behaviour.

☐ 5.2

Assignment rules, including the fallback owner

☐ 5.3 DO FIRST

Notifications, and a limit on how many

Over-notifying trains people to ignore the system entirely.

☐ 5.4

Stalled-deal alerts using the stage durations from section 2

☐ 5.5

Anything that sends external communication is reviewable before sending

PART 6 OF 7 — 6 CHECKS

Reporting

Specify the reports first. They determine the data model, discovering a missing field after launch means backfilling history you no longer have.

☐ 6.1 DO FIRST

The three numbers leadership will ask for every week

☐ 6.2

Pipeline value by stage, weighted by probability

☐ 6.3

Conversion rate between each pair of stages

☐ 6.4

Source attribution through to closed revenue

The report that decides where marketing budget goes.

☐ 6.5

Activity reporting that measures outcomes, not keystrokes

☐ 6.6

Who can see what, permissions by role

PART 7 OF 7 — 5 CHECKS

Launch

☐ 7.1 • DO FIRST

Migration plan for existing data, including what you will not migrate

Importing years of dirty data poisons a clean system on day one.

☐ 7.2

A pilot group before everyone

☐ 7.3

Training material that survives the person who wrote it leaving

☐ 7.4

A defined date when the old system becomes read-only

Two live systems means neither is trusted.

☐ 7.5

A 30-day review scheduled before launch day

Book it now. Nobody books it afterwards.

THE MOST EXPENSIVE MISTAKE

Building the CRM around what leadership wants to report on, rather than around what the sales team actually does. The team then works around the system, the data goes stale, and the reports become confidently wrong.

WANT ME TO LOOK AT YOURS?

If you have gone through this and want a second pair of eyes, book a free call. We open the account together and look at what is actually happening. No deck, no pitch.

- **Book a free call** hamzajameel.com/book-a-call/
- **Free SEO audit** hamzajameel.com/free-seo-audit/
- **Instagram** @ihamza.jameel
- **YouTube** @ihamzajamil

SOURCES

1. Built from CRM implementations at hamzajameel.com/crm-development/