Define a useful CRM trial.

Choose one process and its evidence gates. Use test records and role names, not live customer details.

01 **One process and its success rule**

Decision / owner: _____

02 **Tools and data that must remain**

Decision / owner: _____

03 **Account capacity and working owner**

Decision / owner: _____

04 **Cost ceiling and setup allowance**

Decision / owner: _____

05 **Required gates and decision owner**

Decision / owner: _____

Trial brief: process / owner / constraints / tests / decision

The editable template includes example planning decisions and all six test actions. On the resource page, record observed evidence and download your trial record.

Decision owner: _____ Trial builder: _____
Monthly ceiling: _____ Review date: _____

Collect evidence. Decide the fit.

Full test actions are in the editable template and web worksheet. Record only observed results.

01 Capture the required record

Required fields and source reach the correct owner. Repeat submission follows the written duplicate rule.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Make the human handoff usable

The operator sees the reply and context, owns the next action and observes the agreed follow-up behavior.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 Give an exception a destination

Each chosen exception has a visible destination, responsible person and recorded next step.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Prove the connection you must keep

The required data reaches both intended places. Repeat/failure handling is observed or explicitly unresolved.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Check capacity and operating cost

Required capacity and access fit the selected plan. Documented recurring costs fit the agreed ceiling.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 Test the data exit you need

The test export contains required contact fields. Missing history, configuration and other exit work are listed.

Result: Untested / Needs work / Passed Evidence / owner: _____

Conclusion and unresolved gates

Shortlist / Investigate / Keep current setup: _____
Required gate / evidence / owner: _____
Next action and retest date: _____