



Is Your CRM *Actually Helping?*

A CRM Health Check for Charities & Not-for-Profits

This short checklist will help you step back, reflect honestly and get a clearer picture of how your CRM is really supporting your people, your processes and your purpose.

Because when your CRM works well, everything else gets easier.



What you'll get from this checklist

- ✓ A clear view of **what's working**, **what's not** and what could be better.
- ✓ Insight into how your CRM is **supporting** (or **slowing down**) your team.
- ✓ **Practical next steps** to help you make meaningful improvements.



This isn't about perfection.

It's about progress, people and making your systems work for you.

Your CRM should make life **easier** – not add to the chaos.
Let's find out if it's helping you get where you want to go.



Before You Start

This CRM Health Check is designed to help you take a step back, reflect honestly and spot opportunities to make things better.

There are no right or wrong answers.

It's simply about understanding where you are today.



How it works

- **Read** each statement and think about how it feels for your organisation right now.
- **Score** each statement from **0–10**.
- **There are no right or wrong answers** – just your honest perspective.
- At the end, we'll help you understand what your scores might mean and where to focus your energy.

A few tips before you begin...



Be honest

The more honestly you answer, the more useful your results will be.



Think about your team

Consider the experience of the people who use the CRM every day, not just your own.



Don't overthink it

Go with your first instinct. This isn't about perfection – it's about progress.



There's no pass or fail

This is a starting point for meaningful conversations and positive change.



Take your time

You don't have to do it all in one go. You can come back to it later if you need to.



You know your organisation best.

Trust your experience, your observations and your understanding of what's really happening day to day. That's what will make this most valuable.

What Your Scores Might Mean

Once you've completed the checklist, your scores will give you a snapshot of how healthy your CRM is across key areas.

Here's a simple guide to help you interpret your results.



8–10
Strong Foundations

Great work! Your CRM is supporting your team and your mission well.

Keep going – small tweaks can help you get even more value from it.



5–7
Room to Improve

You're on the right track, but there are a few areas that could be stronger.

Focus on the lower-scoring sections for the biggest impact.



0–4
Needs Attention

Your CRM might be making things harder than they need to be.

Don't worry – you're not alone, and there are practical steps you can take to turn this around.



N/A
Not Applicable

Some statements might not apply to your organisation right now.

That's okay – focus on the ones that do.



Remember...

There's no pass or fail here.

This is about understanding where you are today so you can make confident, people-focused improvements.



You don't have to fix everything at once.
Small changes can make a big difference.



How to Score

For each statement, think about how true it feels for your organisation right now.
Score it using the guide below.

0



Not at all true

This doesn't reflect your situation at the moment.
You've not started this yet or it's not a priority right now.

1-3



Partly true

You're making some progress, but it's inconsistent
or not yet having much impact.

4-7



Mostly true

You're doing well in this area.
There may be a few gaps or things you want to improve.

8-10



Very true

This is working well and adding real value.
Keep it up and consider how you can build on it.

A few things to keep in mind...



Be honest

Your honest answers
will give you the most
useful results.



Think about your team

Consider the experience
of the people who use
the CRM every day.



Focus on progress

This isn't about being
perfect – it's about
getting better.



Take your time

You don't have to do
it all in one go. You can
come back to it later.



You know your organisation best.

Trust your experience, your observations and your understanding
of what's really happening day to day.

That's what will make this most valuable.



Your Next Steps

You've taken the time to reflect honestly – that's a great first step.
Now it's about turning insight into action.

Here are some simple next steps to help you move forward.



1 Pick your priorities

Look at your lowest scores.
Where will you get the most impact
with the effort you have?



Tip

Focus on one or two areas
to start with – small wins
build momentum.



2 Take small, practical actions

You don't need a huge plan.
Start small, keep it simple
and focus on what's achievable.



Tip

Small changes, done consistently,
create the biggest change
over time.



3 Bring the right people with you

The people using your CRM every day
have valuable insights.
Involve them in the conversation.



Tip

Their experience will help
shape solutions that
actually work.



4 Review and keep improving

Your CRM (and your organisation)
will evolve.
Keep checking in and adjusting
as you go.



Tip

Review regularly so you
stay aligned with your
team's needs.



Remember...

You don't have to fix everything at once.
Every step forward is progress.
You're already making a difference.



Need a sounding board or support?

I'd love to help – let's start a conversation.
hello@tuesdayconsultancy.co.uk



QUICK SCORING GUIDE

0 Not at all true

1-3 Partly true

4-7 Mostly true

8-10 Very true

Your Scores

Use the space below to record your scores for each statement.
Add them up at the end to see your overall snapshot.



Area	Statements How true does this feel for your organisation?	Your Score 0-10
 People & Adoption The experience of people using the CRM every day.	1. Our CRM is easy for people to use. 2. People feel confident using the CRM. 3. New users get the support they need.	
 Processes & Workflows How well your CRM supports the way you work.	4. Our CRM processes match how we work. 5. Information flows smoothly between teams. 6. We're not duplicating work or data.	
 Data Quality & Management The quality, accuracy and usefulness of your data.	7. Our data is accurate and up to date. 8. We have clear data standards. 9. We can find the information we need, quickly.	
 Reporting & Insight The insight your CRM helps you see and use.	10. Our CRM reports help us make decisions. 11. We can easily see the information we need. 12. We understand our data and what it's telling us.	
 Systems & Integration How well your CRM works with other systems you use.	13. Our CRM integrates well with other tools. 14. Information is shared between systems. 15. Our systems support our growth.	



Now add up your scores

Add your 15 scores together to get your total.
Use the guide on the next page to see what your score might mean and where to focus your energy.



You're doing great already.

Taking the time to reflect is a powerful step towards building systems that truly support your people and your purpose.

Your Total Score

Your Results

Add up your scores from the previous page to get your total.
This will give you a clear picture of how healthy your CRM is overall.

Your Total Score

Your total score is out of **150**



What your total score means

 120 – 150 Strong Foundations	Your CRM is in a healthy place and supporting your organisation well. Keep going – small tweaks can help you get even more value from it.
 75 – 119 Room to Improve	You're on the right track, but there are areas that could be stronger. Focus on your lowest scoring areas for the biggest impact.
 30 – 74 Needs Attention	Your CRM might be making things harder than it needs to be. Don't worry – you're not alone, and there are practical steps you can take.
 0 – 29 Significant Work Needed	There's a lot of opportunity here. Start small, focus on one area at a time, and build momentum.

Take a moment to reflect...



What surprised you most?
What stood out to you when you saw your scores?



Which area would have the biggest positive impact if it improved?
Where will your focus create the most value?



What's one small action you could take over the next month?
What's a realistic first step you can take?



What happens next?

Every organisation has opportunities to improve.
The important thing isn't getting a perfect score.
It's understanding where you are today and choosing your next step with confidence.



If you'd like a sounding board while you're working through your next steps, I'd love to have a conversation.
hello@tuesdayconsultancy.co.uk

Thank you.

Whether your score was high or low, you've already taken an important first step.
Understanding where you are today is how meaningful change begins.

From chaos to clarity.

