



# Get CRM-Ready: A 10-Step Guide for Manufacturing and Distribution Teams

The image displays the SalesNOW CRM interface on an iPad and an iPhone. The iPad screen shows the "Leads View" with a table of leads and various analytics overlays. The iPhone screen shows a call log for Danielle Daniels with a "Call Outcome" overlay.

**Active Leads Summary:**

Initial Contact	Qualified	Closed Won
195	68	45

**Leads View Table:**

Action	Name	Company	Campaign
<input checked="" type="checkbox"/>	Bob Bobston	Company Name Inc.	Campaign 1
<input type="checkbox"/>	Danielle Daniels	Company Name Inc.	Campaign 1
<input checked="" type="checkbox"/>	Sandy Sanderson	Company Name Inc.	Campaign 1
<input type="checkbox"/>	Kelly KelKelly	Company Name Inc.	Campaign 1
<input type="checkbox"/>	Tom Thompson	Company Name Inc.	Campaign 1
<input type="checkbox"/>	Don Donaleigh	Company Name Inc.	Campaign 1
<input checked="" type="checkbox"/>	Lauren Laurels	Company Name Inc.	Campaign 1

**Annual Sales Trend:**

Line graph showing sales performance over 12 months. The Y-axis ranges from 0 to 100. The X-axis shows months from Jan to Dec. The graph shows a general upward trend with some fluctuations.

**Sales Targets:**

Target	Percentage
Annual Sales Target	83%
Monthly Sales Target	100%
Weekly Sales Target	56%
Daily Sales Target	11%

**Call Log for Danielle Daniels:**

Calling • 00:00:28

**Call Outcome:**

- ☒ Interested
- ☐ Not Interested
- ☐ Call Back
- ☐ No Answer

**Message Outcome:**

- ☒ Interested
- ☐ Not Interested
- ☐ Call Back
- ☐ No Answer





# Get CRM-Ready: A 10-Step Guide for Manufacturing and Distribution Teams

**Thinking about implementing a new CRM system?** Whether you're replacing outdated software or starting from scratch, this checklist is designed to help manufacturing and distribution companies lay the groundwork for a successful CRM rollout—one that drives adoption, supports your unique workflows, and delivers real business value.

CRM implementation isn't just a technology project—it's a cross-functional initiative that affects sales, operations, finance, customer service, and IT. This checklist helps you prepare by focusing on the **foundational work** you should complete before diving into system configuration or vendor selection.



## 1. Assign Ownership & Form a Beta Team

Choose a CRM lead and cross-functional team to guide decisions, test features, and support adoption.



## 2. Define Sales Reporting & Dashboards

Identify key metrics, reporting needs by role, and which ERP data should feed into your CRM.



## 3. Map Your Sales Workflow

Outline your sales process so the CRM can automate steps, send alerts, and support consistent execution.



## 4. Document Your Quote & Approval Process

Define how quotes are created, who approves them, and where ERP data is needed for pricing accuracy.



## 5. Define Mobile Needs for Field Reps

List the must-have features reps need on the go—like contact access, quotes, and offline mode.



## 6. Set Sales & Activity Quotas

Clarify revenue and activity goals by role so they can be tracked using CRM dashboards.



## 7. Outline Your Contract & E-Sign Process

Map your contract workflow and choose e-signature tools to speed up deal closure.



## 8. Build a Post-Sale Project Workflow

Define tasks and handoffs after a deal closes to ensure smooth delivery and operations.



## 9. Plan for Change Order Management

Create a workflow for submitting and approving change orders, with ERP sync in mind.



## 10. Define Work Order Processes

Set up how work orders are created, tracked, and closed—especially for installs or service calls.





### 1. Assign Ownership & Form a Beta Team

Choose a CRM lead and cross-functional team to guide decisions, test features, and support adoption.



Assign a CRM Project Owner



Assemble a Cross-Functional Beta Team

## Assign a CRM Project Owner and Beta Team

The success of any CRM implementation starts with leadership and accountability. Assigning a dedicated CRM Project Owner ensures there is a central figure who is responsible for aligning the CRM rollout with the organization's overall goals. This individual should have a strong understanding of the business's sales processes, technology landscape, and organizational challenges. Their role will include project management, vendor communication, team coordination, and change management throughout the implementation lifecycle.

Equally important is assembling a Beta Team composed of cross-functional stakeholders—ideally from sales, marketing, operations, customer service, and IT. This team should represent a diverse set of perspectives and use cases to ensure the CRM solution addresses real-world challenges across departments. Their feedback will be instrumental during the design, testing, and rollout phases.

The Beta Team should also serve as early adopters and internal champions of the system. Their engagement helps validate configurations, identify workflow gaps, and improve user adoption by acting as peer trainers or support contacts. By involving them from the beginning, companies can better manage expectations and ensure the CRM system is relevant, effective, and user-friendly.

Finally, this group plays a key role in documenting current business processes and identifying opportunities for improvement. These insights are vital for shaping the CRM implementation plan, prioritizing features, and phasing in capabilities over time. With clear leadership and a strong Beta Team, the foundation is set for a CRM deployment that supports long-term success.





## 2. Define Sales Reporting & Dashboards

Identify key metrics, reporting needs by role, and which ERP data should feed into your CRM.



Define Sales Performance Metrics



Plan CRM–ERP Data Integration



Tailor Reporting by User Role



Finalize and Document Reporting Strategy

# Define Sales Reporting and Dashboard Metrics to Review Customer Sales Performance Including ERP Integration

A key benefit of CRM in a manufacturing or distribution business is its ability to deliver real-time visibility into customer sales performance. Defining the right metrics in advance ensures the CRM dashboards and reports are configured to drive data-informed decision-making from day one. These metrics may include revenue by customer or territory, sales cycle duration, pipeline value by stage, quote-to-close ratios, and customer retention rates.

It is equally important to integrate data from your ERP system, as it holds critical information such as order history, inventory availability, invoicing, and fulfillment status. Integration between the CRM and ERP allows for a unified view of each customer, improving forecasting accuracy, reducing order errors, and enhancing customer service. Key data points from ERP should be identified and mapped to CRM fields during planning.

Your reporting strategy should be role-specific. Executives may need high-level KPIs and forecasts, while sales reps need daily dashboards with open tasks, opportunities, and quotas. Sales managers will want visibility into team performance, stalled deals, and territory activity. Defining these reporting needs upfront saves time and ensures you configure meaningful analytics within the CRM.

When reporting requirements are defined clearly, your CRM vendor or implementation team can better align dashboards with business goals. This not only ensures consistency in how performance is measured but also builds trust in the system among users who rely on accurate, actionable data to drive results.





### 3. Map Your Sales Workflow

Outline your sales process so the CRM can automate steps, send alerts, and support consistent execution.



Map the End-to-End Sales Workflow



Identify Key Events and Decision Points



Build Workflow into CRM Design



Standardize and Document the Sales Process

## Define Sales Workflow to Close a Sale

CRM platforms are most effective when they mirror your actual sales process. To prepare for implementation, you should map out each stage of your sales workflow—from lead capture through to deal closure. This includes clearly defining what constitutes a lead, how it progresses through qualification, proposal, negotiation, and ultimately conversion to a customer.

This exercise should involve input from the sales team to ensure that the process is grounded in reality. Consider questions such as: What are the common sales objections? When do we send a proposal? At what point do management approvals come in? Are there handoffs between sales and operations? By defining each step, your CRM can automate status changes, reminders, and alerts.

Automation of the sales workflow within the CRM enables standardization across your sales team, which in turn drives accountability and predictability. It also provides valuable data to improve sales efficiency, such as identifying where deals get stuck or which stages take the longest to progress.

Establishing a standardized sales process also helps with onboarding new team members. By documenting and building your sales workflow into the CRM, you ensure everyone is aligned on expectations and procedures, which contributes to a smoother adoption curve and faster time-to-value for your CRM investment.





#### 4. Document Your Quote & Approval Process

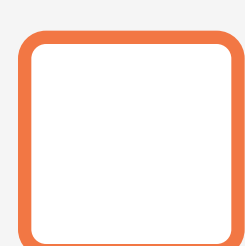
Define how quotes are created, who approves them, and where ERP data is needed for pricing accuracy.



Map the Existing Quote and Proposal Workflow



Define Rules for Management Approvals



Plan ERP Integration (If Applicable)

## Define Sales Quotes and Approval Workflows

In the manufacturing and distribution space, quoting and proposal workflows can be complex and must often include tiered pricing, discounts, and approval checkpoints. To avoid bottlenecks and errors, your CRM should support automated quote generation, dynamic product configurations, and built-in approval workflows.

Start by documenting how quotes are currently created, reviewed, and approved. Who can generate quotes? At what discount level does management approval become necessary? Are there variations in approval thresholds based on product type, region, or customer category? The answers to these questions help define logic that can be built into your CRM.

Integrating quoting workflows into CRM not only accelerates deal velocity but also ensures that pricing policies and margin thresholds are enforced. Managers can be notified instantly when approvals are required, and sales reps can track the status of submitted quotes, minimizing delays.

If your quoting process includes ERP integration, such as for pulling inventory levels or cost data, this should be factored in early. Mapping these integrations ensures your team has the information they need to create accurate quotes in real time, reducing back-and-forth between departments and improving customer response time.





## 5. Define Mobile Needs for Field Reps

List the must-have features reps need on the go—like contact access, quotes, and offline mode.



Gather Mobile Use Cases from Sales Reps



Define Functional Requirements for Mobile CRM

# Define Sales Rep's Mobile Requirements

Sales reps in manufacturing and distribution often spend time on the road, visiting customer sites, trade shows, and job locations. A mobile-accessible CRM is critical for enabling productivity and timely data entry in the field. To prepare for CRM implementation, identify the essential mobile features your sales team needs.

Common mobile requirements include access to customer profiles, sales history, open opportunities, contact info, route planning, task lists, and quote creation. Offline access is also essential, especially in areas with limited connectivity. By prioritizing these features, you ensure the CRM empowers reps rather than hinders them.

Input from field reps is critical here—they can provide insight into what slows them down today and what features would improve their efficiency. Consider conducting a mobile use-case workshop or survey to gather this feedback. This helps inform both CRM configuration and any training materials that are needed for mobile use.

A well-configured mobile CRM not only boosts sales productivity but also improves data accuracy and timeliness. Instead of waiting until the end of the day or week to update CRM, reps can enter notes, activities, and follow-ups on the go. This real-time visibility is a competitive advantage in a fast-moving sales environment.





## 6. Set Sales & Activity Quotas

Clarify revenue and activity goals by role so they can be tracked using CRM dashboards.



Clarify Quota Types and Performance Metrics



Map Quotas to CRM Functionality

# Define the Sales Rep's Sales Quote and Activity Quota Requirements

Understanding and documenting your sales team's performance expectations is critical to CRM success. A sales quota typically refers to the amount of sales revenue or profit a salesperson is expected to generate within a given period. Meanwhile, activity quotas track the number of calls, meetings, emails, or other touchpoints expected to be completed. Clearly outlining both types of quotas helps ensure your CRM supports effective performance monitoring and coaching.

Clarifying these expectations before implementation allows them to be integrated into the CRM system. Sales and activity quotas can be tracked through dashboards and reports, giving managers visibility into team performance and enabling them to proactively address any shortfalls. Reps benefit from seeing their progress in real time, which reinforces accountability and encourages self-directed performance improvements.

These quotas should be tailored by role, geography, and customer segment. For instance, an inside sales rep may have quotas tied to call volume and deal conversions, while a field sales rep may be measured on in-person meetings and total sales closed. Customization ensures the CRM reflects each rep's responsibilities and contribution to business outcomes.

Once quotas are active in the CRM, automated reminders and alerts can help sales reps stay on track and allow managers to identify trends that require intervention. This proactive approach turns the CRM into a strategic performance management tool, supporting consistent sales execution and continuous improvement across the organization.





## 7. Outline Your Contract & E-Sign Process

Map your contract workflow and choose e-signature tools to speed up deal closure.



Map the Contract Creation and Review Workflow



Standardize and Automate Where Possible



Integrate Digital Signature Capabilities

# Define the Contract Process Including Terms and Conditions and Digital Signature Requirements

Many manufacturing and distribution companies deal with complex contracts that include terms around payment, delivery, returns, service levels, and product warranties. To prepare for CRM implementation, it is vital to map out the full contract creation, approval, and signature workflow, including any unique terms and legal clauses that vary by customer or product.

This process often involves multiple stakeholders, including legal, finance, sales, and executive leadership. Documenting who needs to review or approve which contracts based on deal size or customer type allows these workflows to be automated in the CRM. When possible, template standardization of contract language should be pursued to streamline the process.

Digital signature capabilities that are integrated into the CRM enable secure, rapid signing from anywhere. This is especially important in high-volume environments or when dealing with customers across various geographies. Integrating e-signature solutions reduces paper handling, shortens deal cycles, and enhances customer experience.

With a well-defined contract workflow and digital signature integration, companies can gain greater control, visibility, and speed in the deal-closing process. CRM-driven contract management also reduces the risk of non-compliant agreements and ensures that contract versions are tracked and stored in a centralized, searchable location.





## 8. Build a Post-Sale Project Workflow

Define tasks and handoffs after a deal closes to ensure smooth delivery and operations.



Map the Post-Sale Workflow



Capture Project Requirements at the Sales Stage

# Define Project Workflow Requirements Once a Sale is Won

Once a deal is closed, the post-sale workflow becomes the next critical phase. In manufacturing and distribution, this may involve project planning, equipment ordering, site inspections, scheduling, or custom configurations. To ensure a seamless customer journey, your CRM should support a clear handoff from sales to operations or project management.

Begin by mapping out the key steps that follow a closed-won deal. What are the milestones, tasks, and approvals required before a project is delivered or an order is fulfilled? Identifying the departments and individuals responsible for each task enables automation and accountability through the CRM.

Your CRM can be configured to automatically trigger project creation, assign tasks, and initiate notifications to operations, procurement, or customer support teams. Custom fields or forms may be needed to capture key project data during the sales cycle, so it flows smoothly into post-sale processes.

By defining project workflows early, you reduce the risk of dropped handoffs, missed deadlines, and inconsistent customer experiences. CRM-driven project management also improves cross-department visibility and enables better resource planning, ultimately contributing to smoother installations and higher customer satisfaction.



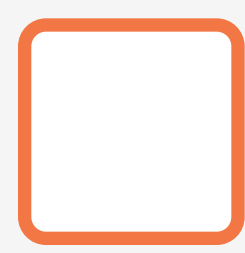


## 9. Plan for Change Order Management

Create a workflow for submitting and approving change orders, with ERP sync in mind.



Document the Current Change Order Process



Design CRM-Based Change Order Workflow



Plan ERP Integration

# Review Change Order Management Requirements Including ERP Integration

In manufacturing and distribution, change orders are a frequent and often unavoidable part of business. Whether due to design changes, product substitutions, timeline shifts, or pricing adjustments, managing change orders effectively is crucial to customer satisfaction and profitability. A CRM system should support this process in a structured, traceable manner.

Start by identifying how change orders are currently initiated, approved, and communicated. Who can submit a change order? What approvals are required? How is the ERP system updated to reflect the change? By understanding this process in depth, your CRM can be designed to streamline change order management.

Integration with your ERP system is particularly important for synchronizing pricing, inventory, and delivery updates. A well-integrated system ensures all stakeholders—including sales, operations, finance, and customer service—have access to the most current information, avoiding miscommunication and delays.

Change order tracking in the CRM provides visibility into the frequency and types of changes requested, allowing for better planning and root cause analysis. Automating this process not only improves internal efficiency but also enhances the professionalism and responsiveness your customers experience during the project lifecycle.





## 10. Define Work Order Processes

Set up how work orders are created, tracked, and closed—especially for installs or service calls.



Map the End-to-End Work Order Lifecycle



Define Required Data Fields



Configure Mobile and Scheduling Capabilities



Plan Reporting and Optimization Features



Integrate Work Orders into CRM Workflow

# Define Work Order Requirements to Manage Installs and Customer Support

For companies that manage installations or provide ongoing support services, work order management is a critical function. To prepare for CRM implementation, you need to define how work orders are created, assigned, scheduled, tracked, and closed. This ensures the CRM system can support your field operations seamlessly.

Identify the key data points required for work orders, such as customer location, equipment details, issue description, assigned technician, estimated duration, and service level agreement (SLA). Determine how this information is collected, whether manually or via integration with other systems, and what workflows are triggered when a work order is submitted.

Mobile accessibility is often essential for field teams, so your CRM should enable technicians to view, update, and close work orders on-site. Integration with calendars and dispatch systems can improve scheduling accuracy and technician utilization, while automated notifications keep customers informed throughout the service process.

Work order data in the CRM also enables better reporting and analytics. Over time, you can track recurring service issues, average response times, technician productivity, and customer satisfaction. By defining these requirements clearly before implementation, you set the stage for a CRM system that not only manages sales but supports full customer lifecycle operations.



**Successfully implementing a CRM solution in a manufacturing or distribution company requires careful planning, cross-functional alignment, and a clear understanding of business processes.**

As you move forward with your CRM initiative, we encourage you to consider SalesNOW, our web and mobile-based CRM platform tailored specifically for manufacturing and distribution companies. SalesNOW is designed to help your organization achieve all of the outcomes discussed in this guide—through streamlined workflows, ERP integration, real-time mobile access, and customizable dashboards.

Our experienced Business Analysts work directly with your team to design and implement a CRM solution that not only meets your current needs but also scales with your future growth.

With SalesNOW, you gain a partner that understands your industry and is committed to your long-term success. By following these ten preparation steps, your organization will be well-positioned to maximize CRM value, drive adoption, and create a seamless experience for both internal teams and customers.

### **Need Help Getting Started?**

Implementing a CRM can be complex—but you don't have to go it alone. If you'd like expert guidance in preparing, customizing, or rolling out a CRM tailored to the needs of your manufacturing or distribution business, we're here to help.

#### **Reach out to us at**

[support@salesnow.com](mailto:support@salesnow.com) and let's make your CRM implementation a success from day one.