

CRM Scalability Checklist

Strategies to Future-Proof a Growing and Diversifying Firm



Scaling smart is about laying the groundwork for long-term success. It's not just about adding tools or hiring more people. It's about creating a structure that supports sustainable growth, operational efficiency, cleaner data, and better decision-making.

At Satuit, we recommend focusing on three essential areas: People, Pipelines, and Processes. Use this checklist to evaluate how well your CRM is set up to handle the challenges of expansion and evolution.

People

Structure your CRM around how your team actually works

- ☐ Role-based permissions are set up for each job function
- ☐ Workflows are assigned to roles rather than individuals
- ☐ The user experience is customized to fit each team's day-to-day tasks
- ☐ Onboarding is fast because views and tasks are already aligned with responsibilities
- ☐ No disruptions occur when someone goes on leave or exits the firm
- ☐ Relationship history is fully preserved, even when contacts or employees change
- ☐ Past communications and records remain organized and easy to access

Pipelines

Match your CRM pipelines to the real structure of your business

- ☐ Separate pipelines exist for each business unit or strategy
- ☐ Field names, stages, and terminology are customized to your internal language

- ☐ Dashboards are built for specific teams, regions, or investor types
- ☐ Reports can be filtered by fund type, geography, entity, or mandate
- ☐ Data is organized in a way that supports analytics, forecasting, and AI tools
- ☐ Leaders can access the reports they need without help from IT
- ☐ Metrics are tailored to your firm's unique goals and growth indicators

Processes

Build consistent workflows that scale with your firm and support compliance

- ☐ Forms adjust dynamically based on the user or type of record
- ☐ Fields are required only when it makes sense in the workflow
- ☐ Tasks, alerts, and emails are triggered automatically
- ☐ Compliance checkpoints are integrated into the process
- ☐ Your CRM connects with email, document storage, and other essential tools
- ☐ Field logic and data rules eliminate confusion during entry
- ☐ Your team regularly reviews data to maintain accuracy and consistency

Let Satuit help!

If you found several areas unchecked, now is a great time to revisit your CRM strategy. Satuit helps firms design CRM systems that grow with them, not against them.

