

The Integration Priorities Worksheet

Most CRM integrations are hygiene. The few that move revenue sit on the path from inquiry to cash. Mark the status of each below — your first move is the highest-ranked one that isn't fully connected.

HOW TO USE Rank is fixed by **proximity to revenue**, not by effort. Work top to bottom. Don't touch the hygiene list until all three above are **Connected**.

THE REVENUE PATH — CONNECT IN THIS ORDER

1

Website RFQ → CRM

Quote requests land as structured data in the CRM — not a shared inbox.

MOVES REVENUE BY: Speed to respond on deals the buyer has already researched.

- ☐ Connected
☐ Partial
☐ Missing

2

CRM ↔ ERP

Pricing, inventory, order history, and account terms in one customer view.

MOVES REVENUE BY: Accurate quotes; one-time orders become repeat accounts.

- ☐ Connected
☐ Partial
☐ Missing

3

Product & Pricing → Quoting

Current product, spec, and pricing data feeds the quote itself.

MOVES REVENUE BY: Same-day quotes instead of four-day ones. Quote velocity is win rate.

- ☐ Connected
☐ Partial
☐ Missing

Hygiene — do these after

Useful for a clean system and informed reps, but they don't win or lose deals. Connect them once the three above are solid.

☐ Email logging ☐ Calendar sync ☐ Web analytics ☐ Marketing automation ☐ Support / ticketing

MY FIRST MOVE _____

NEXT STEP

Want a second set of eyes on your integration path — and a plan for **what to fix first**? We'll walk it with you.

Book a Discovery Call →