

CRM setup checklist for Malta businesses

38 steps, in order, from choosing a CRM to launch. Tick each one as you go.

1. Before you choose

- ☐ Write down the 3 things the CRM must fix (for example: missed WhatsApp leads, no follow-up, quotes lost in email).
- ☐ Name one person who owns the CRM project and decides when there is a disagreement.
- ☐ List every place enquiries arrive: phone, WhatsApp, Facebook and Instagram, lead ads, website forms, email, walk-ins.
- ☐ Agree the stages of your pipeline in plain words, 4 to 7 stages, and what has to be true to move a lead to the next one.
- ☐ Decide what “won” and “lost” mean, and the reasons you want to record when a deal is lost.
- ☐ List the reports you want every week, before you pick any software.

2. Choose ready-made or custom

- ☐ Try the shortlisted ready-made CRMs with 20 real enquiries, not demo data.
- ☐ Check each one handles WhatsApp the way your team really works, including several staff on one number.
- ☐ Note every workaround you would need. Many workarounds is a sign custom may be cheaper over time.
- ☐ Ask who will set it up, import the data and train the team, and what that costs.
- ☐ Check you can export all your data at any time, in a normal format.

3. Data and GDPR

- ☐ Check where the data is stored. An EU region keeps things simpler under GDPR.
- ☐ Sign the data processing agreement (DPA) with the CRM provider and any setup partner.
- ☐ Give each role only the access it needs: sales, office, management.
- ☐ Record where each contact came from and, for marketing, their consent.
- ☐ Set how long you keep leads that never bought, and when they are deleted.

- ☐ Update your privacy policy and know how you will answer an access or deletion request.
Guidance: idpc.org.mt.

4. Move your data

- ☐ Collect every spreadsheet, phone list and email folder that holds customers.
- ☐ Remove duplicates and fix phone numbers to one format (+356...).
- ☐ Decide what to import: active customers and open deals first, old history only if you will use it.
- ☐ Do a test import of 50 records and check them by hand before importing the rest.

5. Connect your channels

- ☐ Website forms send every enquiry into the CRM, with the page it came from.
- ☐ Meta lead ads arrive in the CRM within minutes, not by downloading a file.
- ☐ WhatsApp: use the WhatsApp Business Platform where messages need to sit next to the contact, with approved templates and opt-in.
- ☐ Email and calendar are connected, so replies and meetings appear on the contact.
- ☐ Accounting: quotes and invoices link to the customer, with no retyping.

6. Automate the basics

- ☐ Send an instant reply to every new enquiry, on the channel they used.
- ☐ Assign each new lead to a person automatically, with a reminder if nobody replies.
- ☐ Set follow-up reminders for quotes that have not been answered.
- ☐ Get a simple daily or weekly summary of new, open, won and lost leads.

7. Launch and keep it alive

- ☐ Test the whole journey with real examples, from enquiry to invoice.
- ☐ Train each role on the 5 things they do every day, not every feature.
- ☐ Pick a date when the old spreadsheet becomes read-only.
- ☐ Review after 2 weeks: what is being skipped, and why.
- ☐ Check the weekly report together for the first 2 months.

8. Funding (if the project is large)

- ☐ Check the Digitalise your SME grant before you sign or start any work.
- ☐ Note the next cut-off date and what documents you need.
- ☐ Keep quotes and the project description ready for the application.

Need a hand? Malta Digital sets up ready-made CRMs when they fit and builds custom CRM systems from €7,500, excluding VAT, when they do not. GDPR guidance for organisations: idpc.org.mt. More: malta-digital.com/crm-malta/ · Online version: malta-digital.com/blog/crm-implementation-checklist/