

• A 10-MINUTE SELF-ASSESSMENT

The CRM Health Check

Seven signs your CRM is costing you money, and how to check each one yourself in ten minutes

For COOs, CROs, and Heads of Sales. Whether you inherited the CRM or have run it for years. Every check is something you can run today, without IT and without reading a line of code.

THE 5-YEAR TIPPING POINT

5 yrs



Most CRMs slip into a **net loss after about five years**. The point where the upkeep starts costing more than the system gives back.

Start here, new seat or not

Maybe you took the job last month, maybe you've run this system for years. Either way, the CRM came with years of decisions attached, many of them made by people who have already left the building. Somewhere in there is a field somebody added to solve one problem, an automation bolted on to handle another, a workaround that became permanent because nobody got around to undoing it. None of it is written down, and all of it is yours now.

Which is why, if something already feels wrong, you're probably right. The numbers don't quite tie out. The simplest changes take far longer than they should. Your team has quietly started keeping their real work somewhere other than the system you're paying for. That nagging sense that the thing isn't doing its job has a name, and you're paying interest on it every single day you leave it alone.

The good news is that you can find out exactly where the money is leaking without hiring anyone or learning anything technical. What follows is seven checks, each one about ten minutes of work, each one handing you a hard number in place of a hunch. You don't need to run all of them. Run two or three, and the picture starts to sharpen on its own. By the time you reach the end, you'll understand your own system better than most leaders ever bother to, and you'll know whether it's quietly working for you or quietly working against you.

Before any of that, though, it helps to understand the one idea underneath all seven.

• THE CORE IDEA

The one idea everything else hangs on

People build software quickly and under pressure, so they cut corners, and every corner makes complete sense in the moment it gets cut. The trouble starts when those corners pile up, because at some point they stop being shortcuts and start charging rent. Changes take longer. More things break when you touch them. And the bill grows quietly the longer it goes unpaid, which is the part that catches people out.

That accumulated cost is what people mean by **technical debt**, and the reason it matters to you specifically is timing. It is cheapest to fix early, while the trail is still warm and while you still have the standing to walk in and ask why things are the way they are. Wait a year, and both the cost and the awkwardness go up. So the question worth answering now is a simple one: how much of it are you carrying? Each of the following checks answers a piece of that.

THE COMPOUNDING COST

-16%

per +10% of technical debt



Every extra 10% of technical debt drags gross return on assets down by roughly **16%** and the drag only compounds the longer it goes unaddressed.

The seven checks

We'll start with the one you can feel most clearly, because it's the one that keeps people up at night.

01 The forecast nobody quite believes

You already know this sign if you have it. Somebody on the team rebuilds the forecast in a spreadsheet every month, because the version the CRM spits out can't quite be trusted, or you've simply gotten into the habit of mentally shaving a chunk off whatever number the system reports, just to feel safe presenting it.

To see how bad it actually is, pull a list of every open deal carrying a close date that's already in the past, a blank or zero value, or a stage that hasn't moved in ninety days. Any CRM will filter that in a couple of minutes. A handful of stragglers is ordinary housekeeping and nothing to worry about. But if that list runs to **a quarter of your pipeline**, your forecast is closer to fiction than fact, and the cause sits in the system rather than in your people. The fields were never made mandatory, the stages were never enforced, and the data drifted accordingly. That's worth knowing on its own, and it points directly at the next problem, because bad data rarely stays in one place.

02 The leads that vanish on the way in

Marketing insists they handed the leads over. Sales swears they never arrived. The argument resurfaces every month and never resolves, because nobody can actually prove what happened to them.

You can settle it in ten minutes. Take ten marketing leads from last month and try to trace each one to a named salesperson and a first-contact date inside the CRM. The ones you can follow are fine. The ones you can't are your leak, and if two of the ten disappear, then **a fifth of everything you spend on marketing** is evaporating in the gap between two systems that aren't speaking to each other properly. Most companies argue about this for years without ever putting a number on it. You just did, and the same disconnect that swallows leads tends to show up in a quieter, more dangerous form, which is the next thing to look at.

03 The person you can't afford to lose

There is usually one individual who genuinely understands how the CRM is wired together, and the small, telling sign is this: when they take a week off, a part of you tenses up.

Test it gently. Ask that person to write down every automated process running in the system and who owns each one, and give them a full day to do it. If the list never materialises, or if every line on it traces back to the same individual, then that person has quietly become a **single point of failure** sitting directly on top of your revenue. The fix isn't loyalty or hoping they stay. It's getting what's in their head onto paper and spread across more than one set of hands. But none of that can happen until you've seen the risk clearly, and seeing it usually changes how urgently you treat it.

04 The change that takes a month and breaks three other things

Someone asks for something that sounds trivial. Add a field. Rename a stage. Six weeks later it finally ships, and the whole team braces, because the last time a small change went live, something completely unrelated fell over.

Look at the evidence directly. Ask your team for the last three change requests, find out how long each one actually took from request to live, and ask whether anything else broke when they shipped. When small changes routinely take weeks, or when touching one thing reliably dents another, the system has grown too tangled to change safely. That fragility is a tax, and you pay it on every improvement you'll ever want to make, including all the ambitious things you might be planning with AI. The cost is real whether or not it ever appears on a budget line, and it traces back to the same root as the next sign, which you'll start to recognise around the office.

05 The system everyone quietly works around

You keep finding private spreadsheets. New hires take months rather than weeks to become useful. People update the CRM late, after a nudge, or simply never get to it.

There's a fast way to understand why. Ask two of your better salespeople a single question: what do you keep in your own spreadsheet instead of the CRM, and why? Every secret spreadsheet you uncover is the system failing at the one job it exists to do, and the answer to "why" is almost always some combination of the same three complaints. It's too slow to use. It asks for fields that don't matter. It hides the three fields that do. The deeper consequence is the one that should bother you most, because when your team routes around the CRM, the clean, reliable data you believe you're sitting on simply isn't there, which makes every report built on it suspect. And speaking of things that quietly stopped working, there's a particular kind of breakage that tends to arrive with a change in leadership.

06 The thing that broke the day they left

Since your predecessor walked out, something has felt subtly off. A dashboard that looks flatter than it should. Alerts that have gone quiet. A report nobody has mentioned in weeks.

This one takes ten minutes to confirm. Write down the automated reports and alerts you ought to be receiving, then check which of them have actually landed in the past month. Automations and dashboards are often quietly tied to one person's user account, and when that account gets switched off, they die without a sound, no error message, no warning, just silence where the information used to be. If you've inherited this seat, it's worth checking inside your first month, because the honest truth is that nobody else is going to do it for you. And there's one more thing nobody is checking, except it carries a good deal more risk than a stale dashboard.

07 The access nobody is watching

Off the top of your head, could you name everyone who can see and export your customer data? Almost nobody can, which is exactly the problem.

Ask for one thing: a list of every user able to export customer records. When it comes back, the length tends to surprise people, because it's full of names that shouldn't be there anymore. Staff who left. Contractors who wrapped up months ago. Accounts carrying far more access than the role ever needed. With customer data, a list like that quietly becomes a **compliance problem with your name attached to it** rather than IT's, and unlike the other six, this is the one you won't feel at all until the day it goes badly wrong. That's precisely why it earns ten minutes now rather than a crisis later.

• YOUR SCORE

Adding it up

Run even three of these and you'll be holding something most leaders never trouble to get: hard evidence, in real numbers, of what your CRM is actually doing to the business you're now responsible for. Count up how many came back as a yes, then find your number below.

IN GOOD SHAPE

0-2

Your setup is in reasonable shape, assuming there are real numbers behind those answers and not wishful ones. A look again in a year is enough.

REAL DEBT

3-4

You're carrying real debt. It's costing you today and growing while you sleep, and it calls for a deliberate plan rather than a panic.

WORKING AGAINST YOU

5+

The system has tipped over into working against you. There's an upside even here, though, because a problem this visible is also this fixable, and you've already done the hard part simply by looking at it honestly.

Whatever the count, the more useful question is what you do with it.

What to do with what you found

You're working from facts now instead of feelings, which changes everything about how you should move. Three rules make the difference.

→ Chase the cost, not the noise

The loudest complaint in the building is rarely the most expensive problem, so rank what you found by what it genuinely costs you. A leaking pipeline and a forecast you can't trust will beat a cosmetic irritation every time, and some debt is perfectly fine to leave exactly where it is. Knowing which is which is the entire skill.

→ Clean the foundation first

Before the AI project, before the new tools, before another layer of automation, sort out what's underneath, because everything you stack on a shaky base only makes that base more expensive to repair later.

→ Make it a habit

This stuff grows back. Put one of these checks on a quarterly rhythm and nothing in the system gets to blindside you again.

WHERE THE TIME GOES

26%

of a rep's time is spent selling



Sales reps spend just **26% of their time actually selling**. The rest gets eaten by admin, data entry, and fighting their tools.

The bottom line

A CRM is meant to make selling easier: a cleaner pipeline, faster reps, numbers you can actually stand behind. When it quietly stops doing those things, the damage never arrives as a tidy line on a report. It shows up instead as a forecast you find yourself second-guessing, as leads that die somewhere in the dark, and as a team that spends its energy fighting the software instead of using it to sell.

The leaders who stay ahead of all this aren't the ones with flawless systems, because those don't exist. They're the ones who look early, while the problems are still small and still cheap to put right. You've just done exactly that, and whatever your seven checks turned up, you now understand your own setup a good deal better than you did ten minutes ago. That clarity is where every good decision starts.

When you want the full picture, the reasons sitting underneath what you found, and a clear sense of which fixes are an afternoon's work and which are a month's, that's the part we dig into properly. Reach out whenever it's useful, and a real person will read it.

Let's clear the debt out of your CRM.

We clear the technical debt out of grown-up CRM systems, so your team can get back to selling instead of fighting their tools.

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