STANDARD OPERATING PROCEDURE

CRM Data Entry SOP

Document no.	SOP-SLS-004
Revision	1.0
Owner	Sales Operations Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To keep CRM data accurate, complete, and up to date, so pipeline reports, forecasts, and handoffs between reps are reliable.

2. Scope

Applies to entering and maintaining contact, account, activity, and opportunity records in the CRM for the sales team. Marketing's lead capture forms feed into this process but are configured separately.

Definitions

Duplicate record	A second contact or account record for an entity that already exists in the CRM, usually created by inconsistent data entry.
Opportunity stage	The CRM field tracking how far a deal has progressed through the defined sales process.

3. Responsibilities

Account Executive	Creates and updates opportunity records, logs activities, and keeps stages current for their own deals.
SDR	Creates new contact and account records from inbound and outbound activity, checking for duplicates first.
Sales Operations Manager	Runs data quality audits, merges duplicates, and maintains field standards and picklists.

RACI matrix

Activity	Account Executive	SDR	Sales Operations Manager
Create a new contact or account	C	R/A	I
Log call and meeting activities	R/A	R	I
Update opportunity stage and fields	R/A	-	I
Check for and merge duplicate records	C	C	R/A
Run a data quality audit	I	I	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- CRM system
- Field naming and picklist standards document
- Duplicate detection tool or report
- Data entry style guide

5. Procedure

Step	Task	Owner	Done
5.1	**Search before creating a record** Search the CRM by company name, domain, and contact name before creating a new account or contact, to avoid creating an avoidable duplicate. **Checkpoint:** A duplicate search is completed and shows no existing match before a new account or contact record is created.	SDR	☐
5.2	**Enter the account record fully** Enter the account's legal name, industry, size, and primary domain using the standard naming format, rather than free-typing variations of the company name.	SDR	☐
5.3	**Enter contact details accurately** Enter the contact's name, title, email, and phone number exactly as provided, and link them to the correct account record.	SDR	☐
5.4	**Log every call and meeting** Log every substantive call, meeting, and email exchange with a prospect or customer as an activity on the related record, noting key points discussed.	Account Executive	☐
5.5	**Update the opportunity stage promptly** Update the opportunity's stage in the CRM as soon as it changes, rather than batching updates for a later pipeline review.	Account Executive	☐
5.6	**Fill required opportunity fields** Complete the required fields for each stage, such as close date, deal amount, and next step, before advancing the opportunity further. **Checkpoint:** All required fields for the current opportunity stage are complete before the stage is advanced.	Account Executive	☐
5.7	**Use standard picklist values** Use the defined picklist values for fields like lead source, industry, and lost reason rather than typing free text into fields meant to be standardized.	Account Executive	☐
5.8	**Flag a suspected duplicate** If a possible duplicate account or contact is spotted during regular work, flag it for the sales operations manager rather than creating a second, separate record.	Account Executive	☐
5.9	**Run the periodic duplicate report** Run the duplicate detection report on a set schedule and review flagged matches for accounts and contacts across the CRM.	Sales Operations Manager	☐

Step	Task	Owner	Done
5.10	**Merge confirmed duplicates** Merge confirmed duplicate records, preserving the most complete and recent data and activity history from each, rather than deleting either outright.	Sales Operations Manager	☐
5.11	**Audit stale opportunities** Review opportunities with no logged activity or stage change past a set number of days, and follow up with the owning rep to update or close them.	Sales Operations Manager	☐

6. Quality checks

- New contact and account records have zero unresolved duplicate matches after creation.
- Opportunities have all required fields completed for their current stage.
- Activity logs exist for substantive calls and meetings within one business day.
- Stale opportunities are reviewed and updated on the scheduled audit cadence.

7. Records

- CRM activity and change history
- Duplicate detection audit reports
- Data quality audit findings

8. KPIs

- Percentage of opportunities with complete required fields
- Duplicate record rate per quarter
- Percentage of opportunities updated within the audit window

9. Common mistakes

- Creating a new account record without searching for an existing one first.
- Typing free text into a field meant to use a standard picklist.
- Letting an opportunity stage go stale without an update or activity log.
- Merging duplicate records without checking which has the more complete history.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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