



Excel-to-CRM Switching Checklist

Move your brokerage from spreadsheets to a CRM without losing a single buyer, seller or listing.

FREE CHECKLIST

1. Gather every file

- ☐ The master buyer and seller spreadsheets
- ☐ Every broker's personal copy (the newest data is often here)
- ☐ Listing trackers and deal logs
- ☐ Email contact lists and marketplace exports
- ☐ NDA and buyer registration records
- ☐ Old databases and address books

3. Map the fields

- ☐ Contact details: name, company, email, phone
- ☐ Contact type: buyer, seller, partner, broker
- ☐ Buyer criteria: industry, location, price range
- ☐ Proof of funds and financing notes
- ☐ NDA signed date and listings registered for
- ☐ Assigned broker and original lead source

5. Train the team and switch over

- ☐ Set a switch-over date
- ☐ Make the spreadsheets read-only on that date
- ☐ Train every broker before the switch
- ☐ Agree what must be logged in the CRM
- ☐ Review the first two weeks together

"Excel is a great calculator, and a poor database." Josh Factor, founder of Vertica CRM

6. After the switch

- ☐ Turn marketplace inquiries into contacts automatically
- ☐ Send NDAs for online signature
- ☐ Let the CRM create follow-up tasks
- ☐ Run reports from live pipelines, not spreadsheets
- ☐ Keep Excel for valuations and analysis

Calculate what spreadsheets cost your brokerage with the free Spreadsheet Cost Calculator. Full article: "What Is Excel Really Costing You?" at businessbrokerscrm.com.

2. Clean and normalize

- ☐ Remove duplicate contacts
- ☐ Decide which copy wins when records disagree
- ☐ Split full names into first and last
- ☐ Standardize phone numbers, states and countries
- ☐ Use one list of industries and lead sources
- ☐ Flag do-not-contact and unsubscribed people

4. Import and check

- ☐ Import a small test batch first
- ☐ Spot-check 20 records against the originals
- ☐ Confirm NDAs and listings link to the right buyers
- ☐ Import the rest in stages
- ☐ Check counts: rows in = records out
- ☐ Keep a read-only backup of every original file

Signs you've outgrown Excel

- ☐ More than one person edits the file
- ☐ "FINAL_2" appears in a file name
- ☐ A follow-up lived in a cell, and got missed
- ☐ Simple questions take too long to answer
- ☐ Confidential files are emailed around

You don't have to do it alone. At Vertica CRM, your project manager, training coordinator and onboarding specialist help normalize your existing data and import it, so your buyers, sellers and listings are waiting on day one.

What Excel may be costing one broker (example)

Admin time: 6 hrs/week × 48 weeks × \$100	\$28,800
One lost deal: \$350,000 × 10% commission	\$35,000
Fixing errors: 1 hr/week × 48 weeks × \$100	\$4,800
Total for one broker, per year	\$68,600

Example only. \$350,000 is BizBuySell's 2025 median sale price.