The CRM Fix List: 10 Costly Mistakes Sales & Marketing Teams Keep Making

Whether you use Salesforce, HubSpot, Pipedrive, or another CRM, the same operational problems keep showing up. We've worked with over 100 sales and marketing teams — these are the top 10 errors holding them back, how to spot them, and how to fix them.

1. CRM not integrated with marketing tools
What it looks like: Marketing generates leads, but data is manually exported and imported into the CRM.
Why it's a problem: Leads go cold, data entry errors increase, and you can't track campaign ROI in real time.
Quick fix: Connect your CRM directly to your marketing automation platform.

2. Unused custom fields cluttering the UI
What it looks like: Pages are full of fields created years ago that no one uses.
Why it's a problem: Makes data entry confusing and slows adoption.
Quick fix: Audit and remove unused fields regularly.

3. No SLA between marketing and sales
What it looks like: Marketing hands over "leads" but sales consider them unqualified.
Why it's a problem: Delays follow-up and wastes ad spend.
Quick fix: Agree on what qualifies a lead and the expected follow-up process.

4. Reports that no one reads
What it looks like: Dozens of scheduled reports sit unopened in inboxes.
Why it's a problem: Important insights are ignored, and reporting becomes a box-ticking exercise.
Quick fix: Replace low-use reports with live dashboards and only send actionable reports.

5. Conflicting automation rules
What it looks like: Two workflows try to update the same field in different ways.
Why it's a problem: Creates errors, confusion, and unexpected results.
Quick fix: Audit automation regularly and consolidate overlapping rules.

6. Inconsistent naming conventions
What it looks like: One rep calls it "Prospect – Hot," another calls it "Hot Prospect."

Why it’s a problem: Breaks reporting filters and slows searches.
Quick fix: Standardise naming conventions and enforce them with picklists.

7. Leads not assigned in real time

What it looks like: New leads sit unassigned until someone notices.
Why it’s a problem: Reduces conversion rates and frustrates prospects.
Quick fix: Set automated lead assignment rules.

8. Disconnected customer service history

What it looks like: Support tickets are in a separate system with no visibility for sales.
Why it’s a problem: Sales misses context on client satisfaction or issues.
Quick fix: Integrate service history into the CRM.

9. Poor mobile usability

What it looks like: Reps can’t update records easily on the go.
Why it’s a problem: Data gets lost or delayed.
Quick fix: Optimise CRM layouts for mobile use.

10. No regular data cleansing

What it looks like: Old, incomplete, or incorrect data clogs the system.
Why it’s a problem: Reduces trust in reports and wastes sales effort.
Quick fix: Schedule quarterly data audits.

Let’s fix the bottlenecks. Schedule a CRM Efficiency Audit today.
