Build a CRM with AI

Execution Path

A structured route from idea to working output - the steps, outcomes, workflows, resources, and tools, in order.

Category: Business Systems Steps: 9 Phases: 4
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PATH SUMMARY

9 steps across 4 phases.

Use this document as a portable execution guide. Each step lists the expected outcome and the workflow, resource, and tool used in NewPrompt.

PHASE 1 · Define & Scope

Clarify what you're building and for whom.

Step 1 · Define what your CRM must do

Pin the CRM to your actual sales process - the contacts and accounts you track, the deal stages your pipeline moves through, the activities that count - so the build serves how your team really sells, not a generic template.

OUTCOME

Requirements grounded in your contacts, deals, and pipeline.

USED IN THIS STEP

Workflow	AI Product Requirements Workflow
Resource	Product Requirements Assistant
Tool	System Prompt Generator

Step 2 · Cut it to a first release

A full CRM is years of features; a first release is the core loop - capture a contact, open a deal, move it through the pipeline. Separate that from everything that can wait.

OUTCOME

A first-release scope centered on the core sales loop.

USED IN THIS STEP

Workflow	AI MVP Planning Workflow
Resource	Startup Advisor Role Prompt
Tool	Role Prompt Generator

PHASE 2 · Design

Design the right solution before building.

Step 3 · Model the CRM data

This is the step that makes it a CRM: model contacts, the accounts they belong to, deals and their pipeline stages, and the activity history that ties them together - the relationships a sales team lives in. Get this right and the rest is plumbing; get it wrong and it's a CRM in name only.

OUTCOME

A contacts/accounts/deals/pipeline schema that fits the sales process.

USED IN THIS STEP

Workflow	AI Database Design Workflow
Resource	Schema Design & ERD Prompt - Entities, Relationships, and Keys
Tool	SQL Optimization Prompt

Step 4 · Design the API around contacts and deals

Design the endpoints the CRM is built on - contacts, accounts, deals, pipeline transitions, activities - as a contract before code, so the UI and integrations develop against a stable surface shaped to the CRM model.

OUTCOME

An API contract for contacts, deals, and pipeline operations.

USED IN THIS STEP

Workflow	AI API Design Workflow
Resource	Turn a JSON Schema into a Prompt
Tool	JSON Output Prompt Builder

Step 7 · Design the pipeline UI

Design the components a CRM is used through - the pipeline board, the contact and account views, the deal cards reps drag between stages - as a reusable system, so the interface reflects the sales process instead of a generic CRUD grid.

OUTCOME

A component system for the pipeline board, contacts, and deals.

USED IN THIS STEP

Workflow	AI UI & Component Design Workflow
Resource	Design System Spec Prompt - Components, States, and Accessibility
Tool	Markdown Output Builder

PHASE 3 · Build & Refine

Build, test, secure, and make it production-ready.

Step 5 · Build roles and record ownership

A CRM's access model is its own problem: reps see their own deals, managers see the team's, admins see everything, and record ownership decides who can touch whose pipeline. Design the roles and permissions before the data is exposed.

OUTCOME

Roles and record-ownership rules for reps, managers, and admins.

USED IN THIS STEP

Workflow	AI Auth & Identity Workflow
Resource	RBAC Design Prompt
Tool	Role Prompt Generator

Step 6 · Integrate the sales stack

A CRM that doesn't connect to email, calendar, and lead sources is a data-entry chore nobody updates. Wire those integrations via webhooks and events - with the retries that keep a logged email or a captured lead from vanishing - so the CRM fills itself.

OUTCOME

Email, calendar, and lead-source integrations wired reliably.

USED IN THIS STEP

Workflow	AI Integration & Webhook Workflow
Resource	Turn a JSON Schema into a Prompt
Tool	Multi-Step Prompt Builder

Step 8 · Run a security review

A CRM holds customer data behind role-gated access and runs on integrations - review the auth, record-ownership, and input paths the way an attacker would, and back the findings with tests, before it's live.

OUTCOME

The auth, record-ownership, customer-data, and integration paths reviewed for vulnerabilities before release.

USED IN THIS STEP

Workflow	AI Security Review Workflow
Resource	Security Code Review Prompt
Tool	Code Review Prompt Generator

PHASE 4 · Ship & Validate

Ship with confidence and validate results.

Step 9 · Ship the CRM

Cross from built to live - readiness checked, rollback planned, monitoring in place - and put the CRM in front of the team whose deals will now live in it.

OUTCOME

The CRM shipped with a rollback path and monitoring.

USED IN THIS STEP

Workflow	AI Deployment & Release Workflow
Resource	Production Readiness Review Prompt
Tool	Markdown Output Builder