**CRM Implementation Team: Who to Include and Which Roles to Delegate**

While a CRM system is incredibly useful and can help your business in a variety of ways, it can also be very confusing to those who know little about it. So how do you go about integrating a CRM system into your company? The easiest way is for a CRM implementation team to guide you through the process.

**A Critical Part in the Implementation Process**

Once your company has decided to implement a CRM system, it is necessary to create an implementation team to guide employees through this complex process and ensure success.

Putting together the right CRM implementation team is directly tied to the success of the CRM system. However, it can be tasking to search through your staff and select the ideal candidates. You may have limited personnel and very little practical experience with internal CRM software, but you may have everything you need at hand already.

**Who must be on this Team?**

Additions to the CRM implementation team depend on the type of company you run. Below are general guidelines that you can use to select your team members.

Keep in mind that the implementation of a CRM system is primarily a deployment of software and technology infrastructure systems. These methods of data acquisition are mostly digital and have some electronic hardware components. Implementation must be overseen and pushed from the top level of IT, which is why having the IT Director (or its equivalent position) on board is critical.

Since the Sales, Marketing, and Customer Service Departments will use the CRM system the most, it is beneficial to have the heads of these departments closely involved in the implementation process. Involving these departments allows their leaders to know first-hand how this system will help their teams and will enable them to avoid issues once the CRM system becomes active.

You can choose to include many other members of your staff on this team; most of them will be determined by your particular business enterprise. However, most companies find that having a Business Analyst, an Information Security Specialist, a Finance Representative, and an outside consultant to be very beneficial. All these members are essential to having a complete vision of the process of implementation of a CRM system.

You will find that having a CRM Specialist on hand is also very beneficial, as he or she can provide invaluable feedback. Above all, it is imperative to understand the needs of all levels of your company when implementing a CRM system.