**CRM implementation team: Who to include and what roles to delegate?**

While a CRM system is incredibly useful, and can help your business in a way you would never have believed, 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 you and your company have decided to implement a CRM system, is necessary to create an implementation team to guide the company and the fellow employees through this complex process and ensure the success of the implementation.

Putting together the right CRM implementation supervision team is directly tied to the success that the CRM system will achieve. You have to have the teachers in place before you can start the class, as it were. However, it can be quite the rodeo to search through your staff and select the ideal candidates. You may have limited personnel and very little practical experience with internal CRM software, and much less its implementation; but do not worry, you may have everything you need at hand already.

**Who must be on this team?**

As always, some additions to the CRM implementation team depend on the type of company you run. However, the following roles are common general suggestions that you can use to select your team members.

First, 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 as well. As such, it 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 mostly the sales, marketing, and customer service department will use the system once it’s implemented, it makes sense to have the heads of all these areas well involved in the implementation process. That way, can know first-hand how this system will help their teams, and it will enable them to provide feedback in order to avoid issues once the CRM system becomes active.

You can choose to include many other members of your staff on this team, and 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 department representative, an outside consultant and, of course, a representative of the end users to be very beneficial. All these members are essential to having a complete vision of the process of implementation of a CRM system, and each of them will help guide their respective areas in the integration process.

You will find that having a CRM specialist on hand is also very beneficial, as he or she can provide invaluable feedback on who to include in the team, and which areas may need bolstering. As you plan to incorporate a CRM system, do not bypass the need for moderation and understanding the needs of all levels of your company.