Checklist

Communicating the value of CRM to your team.

Gain buy-in and get people excited about your new CRM system

1 Develop a CRM onboarding plan

Document your CRM implementation timeline and tasks, including the following:

- [ ] When the data import will happen and who will oversee it
- [ ] When each team member will join and who will manage their onboarding
- [ ] When the company will start using CRM reports
- [ ] Specific tasks (and assignees) that need to be completed before using reporting — like creating custom fields or workflows
- [ ] Expectations for team member usage of the CRM platform: milestones to complete, required daily/weekly tasks
- [ ] Companywide CRM usage goals and adoption metrics by target dates of 90 days, and 6 months after implementation
- [ ] Dates for upcoming CRM demos or trainings

2 Host a kickoff meeting with your team

Invite everyone who will be actively using the CRM or interacting with its data. Make sure to address the following:

- [ ] Describe the challenges you're facing that you hope CRM will solve — be specific
- [ ] Describe how you plan for people to use the CRM and how it will improve their workdays
- [ ] Identify the team members who will be active users of the CRM and their specific roles/responsibilities (i.e., pulling monthly reports, keeping the CRM data clean)
- [ ] Present the CRM onboarding plan and share a copy with every team member

3 Hold a CRM walkthrough presentation

Prepare the demo ahead of time and make sure it covers all the main features:

- [ ] Highlight ways it will make employees' daily tasks easier
- [ ] Illustrate the entire customer journey, from initial contact to customer expansion/advocacy

- [ ] Touch on the main features users will be encountering frequently, like:
    - How to track email communications
    - Activity tracking
    - Managing contact details
    - Task logging
    - Opportunities (and how to close them)
    - Pipeline management and tracking deal progress

4 Schedule separate demos for different departments

- [ ] Invite each team whose CRM usage will differ greatly from other groups in your organization, to individual demo meetings.

5 Send an announcement to relevant teams with CRM access instructions

Distribute the information via your main communication channels, like Slack and/or email. Including the following details:

- [ ] Link to access the CRM platform (so people can bookmark it)
- [ ] Login instructions
- [ ] Link to download the mobile app, if there is one
- [ ] Link to download the browser extension or plugin, if there is one

6 Provide additional CRM resources and support

Offer your team ongoing CRM support, like:

- [ ] If you're customizing the CRM system extensively for your organization, consider creating a CRM playbook or how-to guide that breaks down how you'll use the tool.
- [ ] For CRM platforms that offer a user community or help center, make sure your team is aware of these resources and how to access them.
- [ ] Field and incorporate employee feedback regularly to make CRM use as easy as possible
- [ ] Schedule weekly or monthly training meetings or “office hours” where employees can get answers to CRM questions and help troubleshooting any issues with the system