

CRM Rollout Readiness Checklist

What Your Sales Team Needs Before Go-Live

Give the Sales Leader the Narrative – Not Just the Update

- Prepare a deck that walks through: the current state, the future state, the reason for the change and what will improve for the team.
- As the sales leader, you champion the change.
- Because the sales team needs to hear from their leader, not from someone outside their world.

Create a Weekly Update Rhythm

- Use the deck every week to update the team, surface concerns, gather feedback and clarify misunderstandings early.
- This does two things: (1) normalize the change, (2) make the team feel included instead of blindsided.
- Consistency is what keeps alignment from slipping.

Build a Feedback Loop Before the Rollout – Not After

- Solicit feedback from the team while the CRM is being configured – things like qualification, essential tasks, follow-up cadence, etc.
- By the time rollout arrives, it should feel like their workflow, not a project someone handed to them.
- Adoption becomes natural when people see their fingerprints on the process.

Prepare Them Emotionally, Not Just Operationally

- Prepare the team by making sure they understand the “why,” the future state and what’s expected of them.
- Help them feel heard and included...like they own a piece of the CRM.
- Because that’s what makes a rollout stick and what turns a team into champions of the change.

The Real Lesson: Preparing a sales team for a CRM rollout is NOT about communication. It’s about creating champions, building clarity and reinforcing alignment long before CRM rollout.