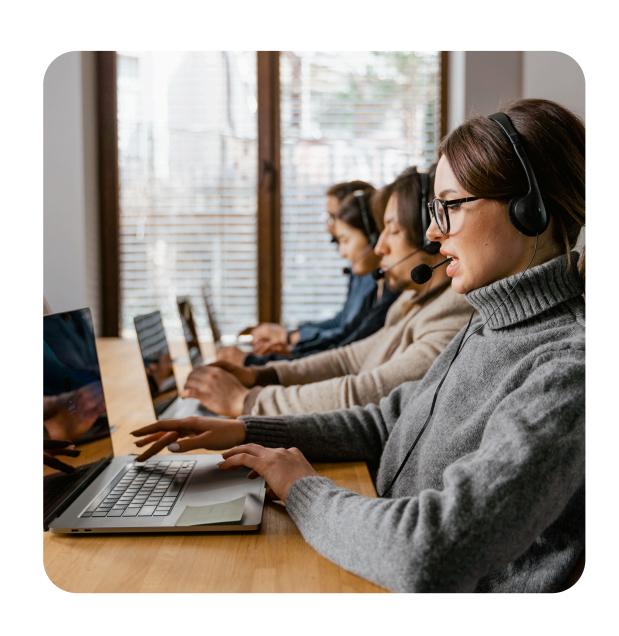PROSPECTUS
IT Recruitment

CRM HIRING PLAYBOOK

Shannon Davies

Introduction

Building a CRM team that delivers results is not just about hiring people with the right qualifications. It is about assembling a team with the right mix of skills, mindset, and commercial understanding to drive adoption, optimisation, and ROI. This playbook offers a practical recruiter's perspective on scaling your Salesforce or CRM function, whether you are hiring your first Admin or your fifth Technical Architect.
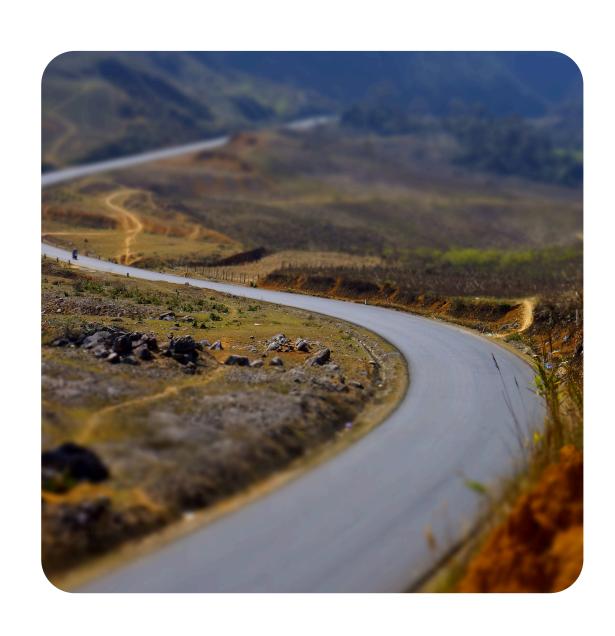
Why CRM Hiring is Different

CRM professionals blend technical ability with business process understanding.

The best CRM hires:

- Speak both tech and business fluently
- Understand user experience and adoption
- Adapt quickly to changing requirements

Yet hiring for CRM often falls into two traps:

1. Over-indexing on certifications rather than outcomes
2. Underestimating the commercial impact of CRM talent

Understanding the CRM Hiring Journey

Typical CRM team growth stages:

Stage 1: Start-up / Initial Rollout
- **Roles**: Admin, Functional Consultant
- **Focus**: Setup, workflows, data import, user training

Stage 2: Expansion / Integration
- **Roles**: Developer, Business Analyst, Tester
- **Focus**: Custom development, 3rd-party tools, API work

Stage 3: Enterprise / Strategic CRM
- **Roles**: Architect, Product Owner, RevOps Manager
- **Focus**: Automation, segmentation, reporting, governance

Defining the Role Clearly

Vague job specs create weak candidate pipelines. Use **these prompts** to sharpen your brief:

- What does success look like in 3, 6, and 12 months?
- What systems will they work with? (e.g. Salesforce Sales Cloud, HubSpot, NetSuite CRM)
- Who will they report to?
- Are they replacing someone or building something new?
- Do you need platform expertise or business insight?

Being clear on these questions helps recruiters attract people who are actually a fit.

Sourcing Talent Strategically

1. Tap into niche communities

- LinkedIn groups, Talent Hubs, Reddit, Trailblazer Community

2. Use a recruitment partner who speaks CRM

- Not just generalist IT recruiters
- Look for someone who can tell the difference between an Admin and a Functional Consultant

3. Don't over-rely on job boards

- CRM talent often comes through referrals, not applications

4. Engage passive candidates

- Many CRM professionals are open to moving, but only for the right opportunity

Core Skills and Green Flags

Admin
- **Skills**: Data import, reports, dashboard creation, user support
- **Green flag**: Proactive about user training and adoption

Consultant / BA
- **Skills**: Stakeholder engagement, requirements gathering, process mapping
- **Green flag**: Can translate business goals into CRM configuration

Developer
- **Skills**: Apex, Visualforce, Lightning Components
- **Green flag**: Clean code, good GitHub examples, collaborative mindset

Interview Questions That Get to the Truth

Avoid vague questions like "Tell me about yourself" - try these instead:

Admin Level

- How have you increased system adoption across users?
- What dashboard are you most proud of building?

Consultant / BA Level

- Walk me through a business process you helped optimise.
- How do you prioritise conflicting requirements?

Developer Level

- Show me a problem you solved with custom code. Why did you go that route?

Beyond the Role – Hiring for Potential

Traits to look for at all levels:

- Curiosity and learning mindset
- Ability to work cross-functionally
- Strong communication skills
- Commercial awareness

Red flags:

- Only certification-focused without hands-on impact
- Poor stakeholder feedback or weak project outcomes

Retention Starts at Recruitment

1. Be transparent about the roadmap
- Let candidates see the long-term potential of the role

2. Involve the right people in interviews
- Candidates often value meeting peers and team leads more than HR

3. Create a frictionless onboarding process
- Pre-start date comms, clear day-one agenda, access to systems, and intro meetings all help

4. Recognise and reward impact early
- CRM teams thrive on knowing their work makes a difference

Final Thoughts

Building a great CRM team is not about **chasing buzzwords** or **job titles**. It is about understanding the **shape of your business**, the **maturity of your systems**, and the **people who can bridge tech and operations**.

Hiring with clarity and care leads to **stronger platforms**, **happier users**, and **better business outcomes**.

Recruitment is not just about filling a gap. It is about **scaling smarter**. In CRM, that means hiring people who can help your systems grow with you.

GET IN TOUCH

Let's talk talent! Book a chat with me:

MEETING

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