CRM TEAM TRAINING CHECKLIST

There are a number of tasks associated with creating the ideal CRM training process. This

checklist takes you through the steps from start to finish so nothing slips through the cracks.

# Choose the CRM Training Team

* + Lead trainer
	+ Sales department
	+ Marketing department
	+ Human resources
	+ Vendor point of contact

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# Determine CRM Training Strategy

##  Scheduling

* + CRM deployment
	+ Training start date
	+ Training end date
	+ Anticipated total number of training hours
	+ Training makeup date

##  Training Goals

* + Company goals:
	+ Department goals:
	+ Team goals:
	+ Individual goals:

# Notify Employees of Upcoming CRM Training

* + Create a message or memo
	+ Explain the benefits of training
	+ Make it mandatory
	+ Set attendance and behavior expectations
	+ Include executives and C-level employees in recipient list

# Choose CRM Training Resources

* + Scenario-based vs role-based training method
	+ Choose one:
		- Vendor-provided
		- External trainer or consultant
		- Hire a staff sales operations manager
	+ Build a resource library for ongoing reference

# Establish Data Input Rules and Best Practices For:

* + Contact information
	+ Customer notes
	+ Promotion information
	+ Lead categorization

# Schedule CRM Training

* + Anticipated total number of training hours (from #2) divided by number of

weeks between training start and end date equals number of one to two-hour training sessions per week

* + Schedule training on company calendar

# Evaluate CRM Training Results

* + Choose one or more:
		- Informal group get together
		- Evaluation survey
		- One-on-one meetings