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