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.

1. Choose the CRM Training Team

- ❑ Lead trainer ____
- ❑ Sales department ____
- ❑ Marketing department _______________________________________
- ❑ Human resources ____
- ❑ Vendor point of contact _____________________________________
- ❑ ____
- ❑ ____

2. 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:

  ____
  ____
  ____

3. 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

4. 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

5. Establish Data Input Rules and Best Practices For:

- ❑ Contact information
- ❑ Customer notes
- ❑ Promotion information
- ❑ Lead categorization
- ❑ ____
- ❑ ____

6. 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-two hour training sessions per week. ______

- ❑ Schedule training on company calendar

7. Evaluate CRM Training Results

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