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: ____________________

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- ☐ Department goals: ____________________

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- ☐ Team goals: ____________________

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- ☐ Individual goals: ____________________

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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
- ☐ Le ead categorization

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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