## **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 t	rainer	
	_	Sales	department	
			ting department	
		Huma	n resources	
	□ Vendor point of contact			
2	. Determine CRM Training Strategy			
			mie er im Frammig en alegy	
☐ Scheduling		Sche	dulina	
	_		CRM deployment	
			Training start date	
			Training start date	
			Anticipated total number of training hours	
			Training makeup date	
		_	Training makeup date	
☐ Training Goals			ing Goals	
☐ Company goals:				
		_	Company goals.	
			Department goals:	



		Team goals:
	٠	Individual goals:
3. N	otify E	Employees of Upcoming CRM Training
٥	Create	e 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. C	hoose	e CRM Training Resources
	Choos	rio-based vs. role-based training method e one:  Vendor-provided  External trainer or consultant  Hire a staff sales operations manager a resource library for ongoing reference
5. E	stabli	sh Data Input Rules and Best Practices For:
	Custor Promo Lead o	et information mer notes tion information categorization
6. S	chedu	ule CRM Training
	weeks	ated total number of training hours (from #2) divided by number of between training start and end date equals number of one-two hour g 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