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# 5 Ways to Perfect Your CRM Training Program

Make learning fun and useful to help your staff take CRM to the next level.

By **Pam Baker** on **April 23, 2008**

In the endless tug-of-war between management and **staff** over **CRM implementation**, little seems to get accomplished. In order to break employee resistance, try **training** agents on CRM from their perspective rather than your own. "I've implemented several CRM systems and find that the most important thing is to make sure the users understand exactly what the system can do for them," said Edward Siegel, director of marketing at **SuperOffice ASA**.

One way to successfully pitch CRM to staff is to present it as "knowledge tracking" rather than "transaction tracking." The emphasis is on gathering **customer information** rather than simply evaluating the **sales representative**. You can also highlight a few time-saving features of CRM at the outset of the training session so that staff views following presentations in a more positive light.

Nevertheless, if you are going to successfully convince staff that using CRM is beneficial to them, you must ensure that the CRM **setup** is user-friendly. Otherwise, **frustration** and suspicion will soon set in. "It would only be by sheer luck that the setup you chose is the right one from the start. In reality, it will need to be tweaked and customized – and you will need to move quickly as often those changes will be directly related to productivity," said Flynn Penoyer, telesales guru at **Penoyer Communications**.

Here are five tips on how to perfect your CRM training program so that everyone is on board and work flows smoothly:

- 1. Begin with functions that favor the agent.** Convince users that CRM will benefit them by immediately introducing them to a helpful feature. "Implement functions that are easily accomplished, easy to use and save a lot of time for the users even if they mean nothing to management," advised Lars Andersson, marketing manager at Sweden-based **Lundalogik AB**. "It could be as simple as a really good template or a time-saving order guide."
- 2. Emphasize the element of methodology.** Train by task, not by feature. If the agent understands how to complete the task at hand, he or she can follow the process easier rather than trying to memorize all the bells and whistles. "To teach a user how to log into the CRM is one thing, but to truly teach a CRM user how to be more productive, effective and efficient you need to add the element of methodology," said Mike Morgan, CEO and co-founder of **COMPLETExRM**. "This one concept has changed my understanding of training CRM more than anything else in the last few years."
- 3. Make training a hands-on experience.** Never make the training sessions pure lecture, advised Penoyer. "If you are doing a training manual for a CRM, it should be driven by tutorials that walk the user through the process – then ask [the trainee] to take new data and repeat the process on his own," he said.
- 4. Teach purpose.** **Teach** reps the purpose and use of each of the CRM program's different fields. If the **software** has been installed properly, each field has a specific use. If information is entered incorrectly, some functionality may not operate correctly. "If the team doesn't understand the fields, they will end up not filling them out, putting in the wrong data, or even entering junk. In all three cases, the data begins to lose value," said Penoyer.

**5. Test staff more than once.** It is common for staff to be tested immediately following the training session. But that one test may not be enough. "They should be retested later to make sure the learning was not simply short-term memorization," said Penoyer.