Tool #33: CRM Training Curriculum Outline

The growing pains of a major change to office technology and staff workflows associated with CRM implementation can be mitigated with a well-executed training. The CRM Training Curriculum[7] outline is meant to give a brief overview of key points to teach to staff during the implementation process. It is not intended to be an exhaustive curriculum, but rather a baseline menu of concepts to consider as a foundation for the specific training developed for your staff.

Implementation Note: To be sure the training is most useful to each staff member, consider their roles and map the curriculum below to their needs. Some might need all the information while others will only interact with the system in limited capacities. In between sessions, to help the training stick, consider using brief "homework" assignments to encourage staff to test the system on their own so concepts will stick after the training. Ccontacts recommend splitting the training into small increments over a week or more to allow staff the time to acclimate themselves.

Overview of CRM Implementation

- **Why the COE unit is adopting a CRM**
  - Specific problems it seeks to solve
  - Specific goals it will help the unit achieve
- **The Selected Vendor and Why It is the Best Option**
  - Advantages
    - Key opportunity to sell CRM as a "problem solver" for diverse areas of the staff
    - Show screen shots or conduct access in a computer lab to allow the staff to see the system during the training
  - Disadvantages
    - It is important to spell out the limitations (as far as you know) so that the implementation process does not appear to be full of empty promises
- **Introducing the Super User**
  - If a CRM "Super User" is already on staff, it's helpful to introduce this person as an expert on the system and a "go-to" for questions and concerns
- **The Implementation Timeline and What to Expect**
  - How should staff manage data during the transition?
  - When and how will data be transferred from the existing system to the new system?
  - When will the implementation be complete?
  - How will our business processes change, if at all?
  - Committee/body/leader that will monitor implementation and manage maintenance
  - How to make suggestions
- **Questions/Discussion'**

System Basics

- **Create/Distribute User Identification and Log In Information**
  - Explain how users will access the CRM and any remote access capabilities
- **Portal Mapping**
  - Employee Portal
  - Student Portal

[7] This curriculum was adapted from the E-council.org CRM Course Outline. For a comprehensive list of topics covered in the E-council.org CRM Course, see: http://www.eccouncil.org/courses/professional_series/crm_course_outline.aspx

Tool #33: CRM Training Curriculum Outline (cont.)

    - Partner Portal
- **Map Institutional User Base**
    - Show map of users within the institution, if possible connecting some users as liaisons to important units/departments who do not have users but whose information is important for the CRM to track
- **Explanation of Task Assignment and Completion (if applicable)**
    - Explain how daily/weekly (or other routine) tasks will be assigned, retrieved, and noted as complete inside the CRM
    - Explain staff performance reporting through CRM (as it is applicable to staff within your purview)
- **Questions/Discussion**

The Student Experience and the CRM

- **Concept of the Student Life Cycle**
    - Student Life Cycle Stages
- **Student Lifetime Value**
    - Maximizing lifetime value of a student
    - Student value management
- **Managing Student Life Cycle in new CRM System**
    - Responsibilities of each staff member along the life cycle

Mapping COE Business Processes to CRM Activities

- **Contact, Opportunity, and Ticket Management Overview**
- **Lead Generation**
- **Prospect Engagement (Communications Plan)**
- **Campaign Management**
- **Questions/Discussion**

Mapping the COE Analytics and Metrics to CRM Activities

- **Analytics & Customer Life Cycle Management**
    - **Running reports on marketing spend**
        - How to run a report and/or how to request a new report be created
        - Types of reports (e.g., marketing spend, success of leads source, etc.)
    - **Running reports on enrollment pipeline**
        - How to run a report and/or how to request a new report be created
        - Where do most prospects fall in the pipeline?
        - What prospective student actions have moved most prospects to a new pipeline stage?
    - **Running reports on applicant conversions**
        - Extracting applicant data from SIS
        - Transferring applicant data to CRM
        - Performing search for duplicates
        - Reporting on applicant conversion level
- **CRM Intelligence Management Cycle**
    - Routine audits for data management
    - Exporting and interaction with other databases on campus