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How to Escape the CRM Training Trap

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We all know the drill: as a software deployment draws near, it must be time for training the users en masse. It's the only cost-effective way to get people up to speed and through the inevitable pains of transition.

But it's only cost-effective on the surface, because if you look at what users are actually capable of 6 weeks later — and the resulting adoption delays — the standard training really isn't very effective no matter what it costs. What if "how do we train everyone" is the wrong question?

With most enterprise applications, there are standardized training courses that will cover 90 percent or more of the operational knowledge required of the user. With real CRM systems, though, the percentage is much lower. Why? Because a killer CRM system must be an amalgam of software, business process, policies, and the "secret sauce" of your sales and marketing. (You may not think it's much of a sauce, but it certainly is a secret.) So training the CRM users to be effective isn't about screen navigation or using special features. It's about having a good set of reflexes that result in responses that customers like.

The key elements of user CRM effectiveness have more to do with interactions with customers, partners, and internal organizations of your company. For example:

- How you do e-mail blasts and lead cultivation to get the highest yield on your marketing efforts.
- The specific questions your phone reps ask, and the ways they introduce cross-sells or upsell products.
- The management techniques and metrics you use in your call center.
- How you qualify prospects, and the meaning of converting a lead.
- When you hand off a prospect to a channel partner, and how you follow up with them.
- The incentives you put in place for your reps and channel managers, and the behaviors you look for and monitor.
- How to handle recurring revenue deals, multi-phase product sales, and long-term purchase agreements.
- How customer references are cultivated and allocated to sales teams.
- How you handle customer support, case / bug tracking, and SLAs.

To be really effective, a CRM system must be tightly integrated with your marketing campaigns, sales techniques, customer support methodology, and customer satisfaction philosophy. So user training must include these elements, as well as the feature "how-to" drill.

Clue #1

Take a look at any CRM vendor's training syllabus. Do you see any of the words from my previous paragraph? You can't buy this course from them. The right training is built, not bought. Just like the most comprehensive CRM systems.

Who's going to build this for you? You can bring in good CRM consultancy (humility prevents me from naming one), but the real resource will be people in your own company. The people who know not only what the sales methodology is, but why it works. The individuals and managers at process "choke points" who see the interactions across departments and know what works best in tricky situations.

But Nobody Has the Time

It's true: nobody has the time for crummy training. And nobody has the time to waste on mistakes or bad guesses or lost deals or unhappy customers, either. In comparison to traditional classes, the right CRM training takes less overall time yet delivers more leverage to users.

The first bit of guidance is "move away from long training sessions." They take more effort to prepare, and they take users away from their real jobs for too long. Most people don't have the interest or attention span for more than 45 minutes per session, so design the sessions to be that short.

The second bit is "stay out of classroom mode." The slide set should be short, presented by someone whom they respect. The sessions need to include task-oriented cheat-sheets that show the users *exactly* what to do on their screen during common workday situations.

Next is "let the users drive." It's best if every user is driving the mouse during the sessions, because that gets everyone focused on task-oriented training (rather than feature-itis). If users don't have laptops, don't make them sit in a room: do the training at their desks by Web conference.

Again with the KISSS principle

Finally, the KISSS principle applies to training: short, separate sessions that come in increments. Training is a process, not an event. Optimizing for recollection and effective knowledge, the sessions should be a series that happens on a regular basis (perhaps weekly), with "office hours" for people needing hand-holding and a response center to get people out of jams. The training should be self-paced and, in large organizations, asynchronous. So create 15 minute videos and podcasts, with workbooks and cheat-sheets that the user can grab at any time from your Wiki. *You do* have a Wiki for your CRM system, right?

When executed correctly, this all is cheaper than standard training. You aren't taking people away from their jobs for long, you're not flying them anywhere, and you aren't cramming data into their heads in the hope that it will stay there until next morning. Instead, you're giving them just what they need to be effective. On-demand training for an on-demand world.

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