

Basic to Advanced CRM Operations Training Guide

Module 1: Introduction to CRM

This module covers the fundamentals of Customer Relationship Management (CRM) systems, their purpose, and key benefits for organizations.

- Definition and purpose of CRM
- Common CRM features (contact management, sales automation, etc.)
- Overview of leading CRM platforms
- CRM user roles & permissions

Module 2: Basic Operations

Contact Management

1. Adding and editing contacts
2. Importing contact lists
3. Search and filter functions
4. Managing duplicate records

Task and Activity Tracking

- Creating activities and reminders
- Assigning tasks to users
- Logging calls and emails

Lead Management

- Lead creation and qualification
- Assigning leads to teams
- Lead status lifecycle

Module 3: Intermediate Operations

Sales Pipeline Management

1. Understanding pipeline stages
2. Updating deal status
3. Forecasting sales opportunities

Workflow Automation

- Setting up automation rules
- Email templates and triggers
- Automated follow-up actions

Reporting & Dashboards

- Running standard reports
- Building custom dashboards
- Scheduling report delivery

Module 4: Advanced Operations

Data Integration

- Connecting CRM with email and calendar
- Integration with external apps (marketing, support, etc.)
- Data import/export best practices

Advanced Automation

- Custom workflows
- Conditional automation
- API triggers and webhooks

Security and Audit Logs

- User access controls
- Record-level security
- Monitoring audit logs

Reference: Sample CRM User Roles

Role	Description	Main Permissions
Admin	Full access to settings and data	Manage users, all records, integrations
Sales Rep	Manages own leads, contacts, and deals	Create/edit/view deals, tasks
Manager	Oversees team performance	View all team records, run reports
Support	Handles customer support cases	Access to tickets, communications

Best Practices Checklist

- Keep data clean and up to date regularly
- Document and automate repetitive processes
- Use dashboards for real-time insights
- Train team members on new features
- Regularly review permissions and security settings

End of Training Guide

