

CRM Role-Based Training Curriculum Example

This document outlines a sample curriculum for CRM training tailored to different user roles.

Sales Representative

Module	Topics	Duration
CRM Overview	System navigation, dashboards, user profile	30 min
Lead Management	Creating leads, lead qualification, tracking activities	45 min
Opportunity Management	Managing pipeline, updating status, forecasting	45 min
Reporting	Accessing and interpreting standard sales reports	30 min

Sales Manager

Module	Topics	Duration
CRM Overview	System navigation, team dashboards, manager controls	30 min
Pipeline Management	Team pipeline visibility, pipeline reviews, setting targets	45 min
Custom Reports & Dashboards	Building and sharing customized reports	60 min
Coaching Tools	Using CRM data for team coaching	30 min

CRM Administrator

Module	Topics	Duration
System Configuration	User roles, permissions, and security settings	60 min
Data Management	Imports, data cleanup, and backups	45 min
Automation	Workflows and rule setup	45 min
Support Tools	Troubleshooting, support resources	30 min