If You Want Customer-Centricity To Take Hold for the Long Term, You Need Full-Fledged CRM Training

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Matthew was a customer management and marketing employee at an automotive retail client of ours. He didn't know much about CRM, but his company had identified him as the future internal CRM trainer. The company's goal was to set up a continuous CRM training program for all employees—about 250. We set up a training session intended to prepare Matthew for this challenging job.

What kind of qualifications and which working experience does a CRM trainer need? This is a question I'm frequently asked in client projects.

The answer is complex because CRM, itself, is complex. And for each company, it means an individual approach to defining a clear CRM strategy and the related processes and IT infrastructure requirements.

The same happens with CRM trainers. You need training skills in terms of motivating people; you need to be able to transmit an idea in a clear, simple and easy-to-apply manner and to be able to involve people with role plays. That's understood as a basic requirement for someone who calls him- or herself a trainer. But CRM training must go deeper into understanding the CRM landscape of the company that wants to train its employees in CRM.

If a company really wants its staff to participate in profitable, long-term relationships with its customers—and invest in regular training sessions being given by capable CRM trainers—these trainers need to be able to:

- Understand what CRM means for this company.
- Have knowledge about customer segments, in terms of whom you're serving, the kinds of people who are behind your customers and your customer segmentation.
- Provide an overview of customer-critical situations in daily business.
- Transmit crucial facts and figures regarding the company's performance with the customer, such as customer satisfaction surveys, type of complaints, reasons for customer churn and loyalty rate.
- Inform people about corrective measures and continuous CRM improvements.
- Relate CRM performance to overall company performance.

Why all this? Why does a CRM trainer need to have all this sensitive information and share it with the rest of the organization? Because that person trains *all* employees: top managers, middle management and operative staff with direct customer contact. People who need CRM training come from all hierarchical levels. And this requires a high degree of adoption and deep understanding of the matter for the CRM trainer. The CRM trainer becomes the “steady customer representative” within the company.

We are helping a large customer design a training concept, which involves delivering training courses for CRM cultural change, customer-centric process execution and CRM system usage in six different European countries. The “train the trainer” sessions are set up for four days in the central headquarters with the following structure:

- **The first day** is dedicated to an introduction to CRM. This is dos and and donts and explanatory real cases and benchmarks in the equivalent European industry sector.

- **The second day** is fully dedicated to explain the company's CRM “history”. When did the project start? Who are the main stakeholders? What is the scope of CRM? What was the reason for major project decisions? What is the company's customer base and segmentation? What is the strategy behind implementing CRM? Which are the main processes? The objective is to prepare the trainers as internal subject matter experts, because each training course is also a forum for opening discussions of how things are going, and whether every relevant CRM issue has been considered in the project.

- **The third day**, the trainers are introduced to country-specific CRM issues. Each one of the six countries is treated individually, to make sure the trainers are not only introduced in their market, but also they understand countrywide CRM specifics and challenges. Each market is different because we are facing different cultures when it comes to people who receive CRM training. Or do you think CRM training in the Netherlands is the same as training Italian people?

- **The fourth day** is more technical, with a detailed introduction in training material that includes presentations, real customer scenarios to be discussed during the courses, an explanation of each CRM process to be trained and usage of the different modules of our client's CRM software.

When you design a CRM train the trainer session, you should consider three main phases after having designated the appropriate future internal CRM trainers:

1. **Preparation of a CRM “infopackage.”** Everything in your preparation must be consolidated across the organization and documented for the training. Don't underestimate the timely effort for this work. There are companies where this information can be obtained by a “click” in a reporting system, and there are other companies where this information is distributed in different departments or business lines, where consolidation takes at least four weeks. That's usually the norm.

2. **Preparation of training content and pragmatic exercises/roleplays.** Training content should start with a basic introduction to CRM, in terms of when it started and its evolution, scope and current trends. Then you should discuss industry benchmark examples, such as which company is doing better than others? What are CRM measures that can be “copied”? It is crucial that you demonstrate real examples of the company's daily business with customers. In most courses, the trainer receives a bad degree if he or she is not able to understand such things as a call center agent's day and customer interactions.

3. **The actual training sessions and follow-up.** A CRM "train-the-trainer" course lasts at least three days “in company.” It involves lots of information, business-relevant interfaces and coordination among departments. It requires time to train and digest. Regular follow-ups are crucial to ensure that the trained CRM trainers are up to date.

In our client project, we make sure that the relevance of CRM training is understood as a long-term, continuous assignment for the organization.

Now, how is Matthew doing? Very, very well. He not only has designed and delivered his first CRM training to customer-facing, frontline colleagues, but also he has developed his own methodology of how to train mechanics and other “back-office” colleagues in CRM. That's because, to those colleagues, the customer is a black box and the first thing they needed to understand is what type of customers the company was dealing with.