MICROSOFT DYNAMICS® CRM TRAINING

Get the best out of Microsoft Dynamics CRM with training from Tisski.

Ensure the successful use of your system and exceed your objectives.

tisski
GROWTH THROUGH TECHNOLOGY

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Introduction

Microsoft Dynamics® CRM is designed to support your marketing, sales and customer service departments. As an easy to use solution that is designed to increase the efficiency of your processes and the results from key customer facing departments within your organisation, Microsoft Dynamics CRM can offer a number of impressive benefits.

One of the best ways to ensure that you and your team are getting the most from your CRM solution is through a well-planned and delivered user training programme.

As well as implementing Microsoft Dynamics CRM, as a Microsoft Partner, Tisski also offers a number of training options which are designed to help your users to feel comfortable and confident when using the system.

CRM training from Tisski will:

- Ensure that the system processes established are effective and understood by users
- Enable users to feel confident in using the system
- Embed the CRM solution and expertise into your organisation
- Show you how to reap the benefits of using Microsoft's award winning CRM solution
- Increase understanding of the use of the system across departments and the awareness of the roles and requirements of other team members.

Many organisations don't realise the full potential of their CRM solution, and that probably includes many of your competitors. By investing in a training programme you are already one step ahead of the competiton.

Tisski has established tried and tested training methods which have contributed greatly to the successful use of CRM within companies of all shapes and sizes, and across a number of industries. Our trainers are not only experts in the usage and application of Microsoft Dynamics CRM functionality, they are also able to recognise the varied learning styles presented by delegates. This enables them to tailor their approach, ensuring that every trainee completes their training with high levels of knowledge and confidence.

This guide will offer you an overview of the CRM training services offered by Tisski, as well as advice on how to plan your training so that your users leave the session feeling excited about using the system.

CRM Training With Tisski

At Tisski we pride ourselves not only on our depth of knowledge when it comes to Microsoft Dynamics CRM, but on our level of expertise around the benefits of properly embedding a CRM solution into your organisation. As such we provide effective CRM training courses for many of our clients, in fact, training is an essential element of our Rapid Deployment Process.

Whether we implemented your Microsoft Dynamics CRM solution ourselves, or you are coming to us purely to benefit from our training services, we can help.

Planning Your CRM Training

We will work with you to plan your training programme, whether it is for one or hundreds of users, so that you are confident that the users of Microsoft Dynamics® CRM will get everything that they need from their time with our trainers. We will walk you through some of the following considerations so that we can tailor your training accordingly, however, it's always useful to take the time to think about your requirements beforehand.

Some things that are worth considering when working with us to plan your CRM training include:

What do you want to achieve?
It is important that the objectives of your Microsoft Dynamics CRM training are discussed with your trainer beforehand. This will allows us to design and deliver your training with these in mind which will make for a positive outcome for your company and CRM users.

Depth of training required
It's important that we understand the levels of experience across your user base. Some users may have used Microsoft Dynamics CRM in a previous role, while others have never even seen the software before.

By understanding the various levels of expertise we are dealing with, we can ensure that all abilities are catered for. This could all be handled in a single group training session, or various abilities could be split into different groups. All of this will be discussed and agreed on, while keeping the key objective in mind – ensuring that all of your users feel comfortable and confident in using the system as part of their day to day role.

Where your users are based
Business is ever changing, today that means that not everyone will necessarily be in the same location. If that's the case, we can utilise a number of training methods, whether that's arranging a centralised training day where everyone can attend, or arranging online training to accommodate users in different locations, and even in different time zones.

User Roles
It's important for your trainer to understand the roles of your users. With larger groups in particular, delegates could be grouped into similar roles. Once this is done we can plan your Microsoft Dynamics CRM training based on what the various roles will need to accomplish from using the system.

We will also design the training with an educational element across all of the other departments using the solution. The more that people understand the various processes from end-to-end and the higher the knowledge about other department/user objectives, the more collaborative users will be when using the Microsoft Dynamics CRM on a daily basis.

Executive training
We've found that it's important to have your management team take part in the training. The benefits of this are twofold;

1. They can assist the trainer in answering any questions regarding process design, reporting and output requirements, etc…
2. They will leave with an understanding of the processes being implemented from a user point of view.

Training Agenda

Are any particular areas that you would like us to include in the training in particular? Let us know during the planning stage and we can develop elements of the training based on these requirements.

We will work with you to develop a training agenda based on your specific requirements, this will include;

• How to use the system based on the needs of the company and taking into account current experience levels and job roles
• How CRM will improve each users job role
• How CRM is going to benefit the users and the company
• Why the company has decided to implement Microsoft Dynamics® CRM
• Regular breaks to ensure that the delegates don't flag or miss vital information
• Ample time for questions

Training Evaluation

Once the training is complete, we will be on hand to help with any questions or user issues which may arise. All users will also have access to our comprehensive and regularly updated resource portal, as well as telephone access to our customer support team in line with your SLA.

Pre-Training System Access

In order to design the best training programme possible, we may need access to your Microsoft Dynamics CRM solution, particularly if there have been a number of bespoke customisations applied. This can be achieved online or by visiting you onsite.

Training Delivery Methods

At Tisski we are very aware that we will need to take a number of factors into consideration which will dictate how your CRM training is delivered:

- Location of users
- Learning style of users
- Different experience levels

That's why we offer a number of training delivery options to ensure that it fits in with your requirements and offers the best learning experience possible.

Classroom Training

Instructor led training will be held onsite and carried out using your CRM installation. This method is perfect for teams that are all based in one location and for learners who will benefit from a classroom environment and face to face interaction with our trainer.

Our trainer will take your users through the agreed agenda over the agreed period of time. This could involve a single group session over a day, or multiple group sessions over a number of days. Classroom training is fully customisable depending on your requirements.

Online Training

Like classroom training, our online training sessions are live, instructor-led and carried out using your CRM solution. Online training is perfect for geographically dispersed teams or teams who have differing schedules and require training at different times. We can also record the training session and make this available to you as a resource for refresher training or for use with new users.

Video Training

Sometimes it can be difficult to get all of your users into one place at one time, or to find a time for training that fits into everyone's schedule. Video training offers users the opportunity to learn about Microsoft Dynamics® CRM at their own pace.

Video training is also a great tool if you have users of different experience levels, enabling everyone to get to the same level before attending classroom or online training.

Train the Trainer

We recommend that train the trainer sessions are carried out in a classroom, this is simply because of the more in-depth nature of the training. This training course will enable you to carry out CRM training in-house using your own trainers.

Train the trainer is fantastic for organisations with large numbers of users, or who will be adding new users with temporary or permanent access to CRM regularly. Self-sufficiency is important to some of our clients and we've found that this option meets their requirements well.

Learn @ Lunch

Learn @ Lunch offers users access to instructor led training in short sessions of 30 – 45 minutes. This is great as a refresher training option, or to help those users who require more in-depth knowledge of Microsoft Dynamics CRM. It's also great as a session to refine processes and discuss any further enhancements that may be needed.

Whether one or more of these methods is suitable for you, we will put together a tailored programme to ensure that your users get the most out of their training.

Training Materials

To support our training we offer access to a variety of training materials, such as:

- Customised training manuals as part of classroom training
- Access to recorded online sessions
- Video training and standard training manuals as part of our training portal

Conclusion

Training your users is a key element of successfully embedding your Microsoft Dynamics® CRM solution and ensuring efficient use from day one. As an organisation you will benefit from your users being comfortable and confident when using the system, not only in terms of day to day results, but when it comes to the long term return on investment.

That's why at Tisski, we work with you directly to ensure that your users get the most out of their CRM training.

For more information, or to discuss your training requirements in more detail, contact us today on **0203 418 0411**.

T : 0247 7712050

E : info@tisski.com

W: www.tisski.com

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IN PEOPLE

Designed for your industry - Tailored for your business