what this webinar is about

risks of not training

implementing a training plan

when to revisit training

tips for a successful training

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why listen to us?

- membership sector specialist since 1991
- working with trade associations and professional bodies
- complete membership management solutions
- MemberWise Official Partner

- professional trainer
- 2 years head of training at oomi
- 7 years in membership and training at membership body
- cricket coach

01

risks of not training

risks from lack of training

aversion to using the CRM

data errors and data breaches

tasks take longer

bad practise passed on

high staff turnover

Photo by Or Hakim on Unsplash

"65% of CRM users say training is essential for success"

Source: Digital Socius – CRM Statistics 2025

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*The training was **incredibly valuable**. The sessions were clear, practical, and tailored to how we **actually work day-to-day**. We left the training feeling informed and **ready to make full use of the platform's capabilities**.*

besa | ✓
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SUPPLIERS ASSOCIATION

02

implementing
a training plan

training vs instruction

Instruction is:
- someone **showing** you the system
- passing on knowledge – whether correct or not
- perhaps a written document at best

Training is:
- organised, structured session
- run by an expert/trainer, who can use deferent techniques
- using all the learning styles
- doing as much as showing
- supporting documentation

the training plan - things to consider

planning

- what stages need to be considered
- how long will training last
- who requires training and at what stage

budget

- included in your CRM budget
- recognises ongoing needs

who & how

- who will provide the training
- how will training be provided (in-person?)

objectives

- training objectives for all types of users
- appropriate for the job role

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the training plan - implementation

- for new CRM, there must be training stages: initial, UAT, go-live, on-going

- part of change management - staff need to feel confident and able to see the benefits

- establish best practice and introduce new procedures

- develop habits that will enable all to get the most from the CRM (consistency)

- ensure faster ROI on new system

"42% of businesses cite lack of training or CRM experts as the biggest barrier to adoption"
Source: crm.org

the training implementation – in-person delivery

- engagement

- increased personal assistance during In-person training

- extra time required to deliver online training (potentially more expensive)

- more training taken in, in-person

- zoom burnout

"Tell me and I forget, teach me and I may remember, involve me and I learn."
Benjamin Franklin

03
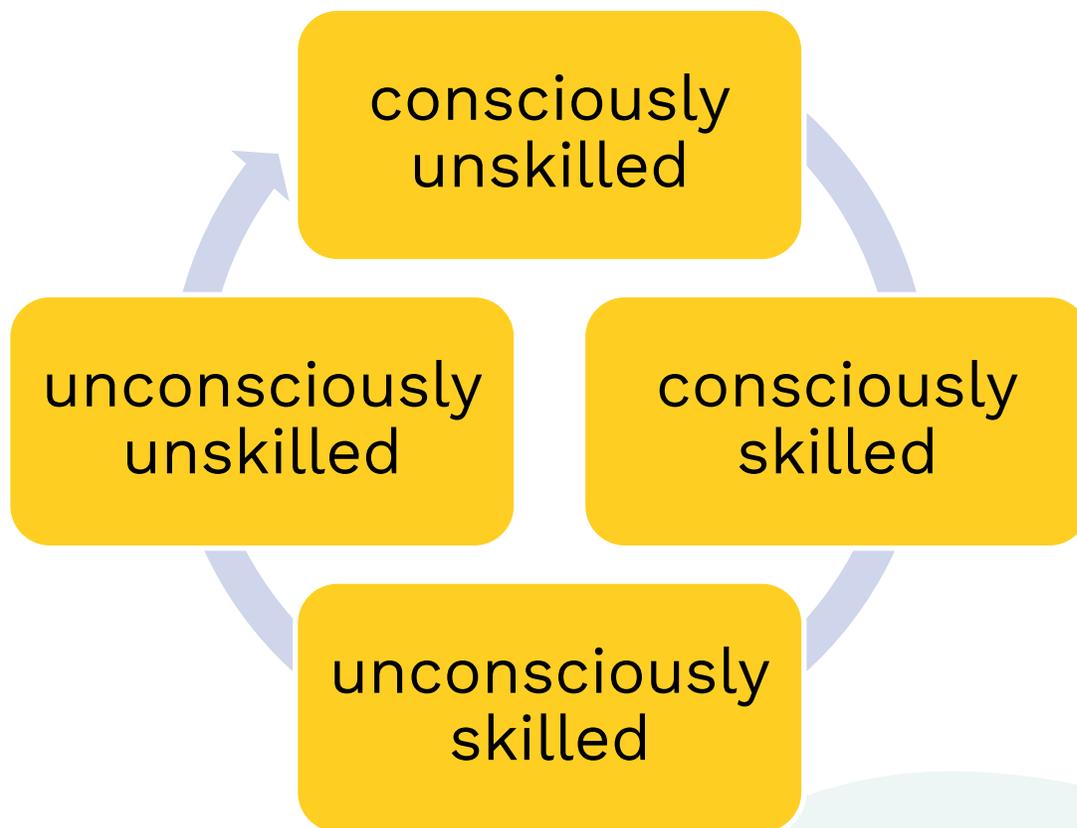
ongoing training

triggers for training

system upgrades

returning to work

new employees

regular refreshers for all (CPD)

04

tips for a successful training

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best practice

risk

best practice	risk
work with the provider, and a **skilled trainer** who knows the system	using a colleague or technical expert, leads to **ineffective learning, lack of skills and confidence**
sessions should be **practical and hands-on**	being **"shown" is not training**
train on step-by-step processes**, relevant for individuals**	focusing on areas not relevant – decreased engagement, and **wastes time and money**
make sure adequate **budget** is attributed to training	not investing, **always** costs more in the long-run
training and CPD are an **on-going process**	will lead to unskilled workers and **high staff turnover**
in-person always works best	online = no hands-on support, essential for learning practical skills; **learning and engagement severely reduced**

customer case study

- new CRM installed quickly
  (part in Covid lockdown)
- part of major change programme
- went off track
- implemented training programme
- everyone happy again and onboard
- CRM producing results

"The training there was instrumental in engaging their staff and getting them over what were previously lots of "workarounds", as they had called them"

Philip Walters, Customer Success Manager, oomi

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questions?

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thank you