

SoftwareGlimpse CRM Training Plan

Updated: 15 Aug 2026

Project / CRM: _____
Owner / Team: _____
Date: _____

Plan role-based CRM enablement before production seats open.

HOW TO USE THIS RESOURCE

- 1 Audiences
- 2 Curricula
- 3 Practice
- 4 Sessions
- 5 Certify-lite
- 6 Reinforce

Key: [] Pass [] Partial [] Fail [] Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT
1. AUDIENCES & OWNERS					
1.1	Wave-one roles listed (AE, manager, admin, CS)	The role you forget is the one that edits deals without training.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Later waves given target dates	Deferred audiences return as unplanned support load when nobody owns a date.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Curriculum owner per role track	Object-level scripts drift without one accountable author per role.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Certification signer per role	A pass with no signer is self-reported.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Session and communications owner named	Invites, sandbox links, and access instructions fall between owners.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. AE TRACK					
2.1	Create an account with a linked contact	Contacts stranded from accounts break ownership and reporting from day one.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Open a deal with stage, close date, and owner	The pipeline is only as honest as the fields sellers fill at creation.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Set a dated next step on an open deal	Deals without a next step become the stuck pipeline managers chase later.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Advance a stage using your exit criteria	Stage discipline learned in practice is what makes the forecast readable later.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Log an activity on the right record	Activity logged as a personal task instead of on the record hides the account history.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.6	Complete the email and calendar sync privacy brief	Sellers connect mailboxes faster than they ask what syncs and who can read it.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.7	Convert a lead preserving source and owner	Attribution and ownership break quietly at conversion when nobody practices it.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. MANAGER TRACK					
3.1	Run a stuck-deal / missing-next-step review	Managers who cannot filter risk return to their own sheet within a week.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

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3.2	Reassign deal and contact ownership	Territory changes and departures stall when only admins can move ownership.	*		○ Pass ○ Fail	○ Partial ○ N/T
3.3	Open the pipeline or forecast view leadership will use	A weekly number nobody can reproduce in CRM becomes a spreadsheet again.	*		○ Pass ○ Fail	○ Partial ○ N/T
3.4	Coach stage honesty from the exit criteria	Stage inflation is a coaching habit, not a configuration problem.	-		○ Pass ○ Fail	○ Partial ○ N/T
4. ADMIN TRACK						
4.1	Provision a user and assign a role	Rollout stalls whenever only the vendor can add a seat.	*		○ Pass ○ Fail	○ Partial ○ N/T
4.2	Deactivate a user and confirm access is gone	Leavers keep access whenever offboarding was never practiced.	*		○ Pass ○ Fail	○ Partial ○ N/T
4.3	Verify object visibility for each persona	Least privilege that nobody tested is an assumption.	*		○ Pass ○ Fail	○ Partial ○ N/T
4.4	Resolve a duplicate contact and a required-field gap	Duplicate contacts and empty required fields are the two most common day-one tickets.	*		○ Pass ○ Fail	○ Partial ○ N/T
4.5	Know the import boundary	Ad-hoc admin imports recreate the mess the migration plan was meant to prevent.	-		○ Pass ○ Fail	○ Partial ○ N/T
4.6	Support and escalation path documented	Sync failures and permission requests need a route before go-live, not after.	*		○ Pass ○ Fail	○ Partial ○ N/T
5. CS / POST-SALE TRACK						
5.1	Receive a Closed-Won handoff	Won deals stall when handoff fields and account ownership are undefined.	-		○ Pass ○ Fail	○ Partial ○ N/T
5.2	Find the account timeline and log post-sale activity	CS creating a second account is how customer history splits in two.	-		○ Pass ○ Fail	○ Partial ○ N/T
5.3	Post-sale ownership written down when there is no CS track	Ambiguous post-sale ownership is worse than having no CS track at all.	*		○ Pass ○ Fail	○ Partial ○ N/T
6. SANDBOX PRACTICE SET						
6.1	Sandbox loaded with sample accounts, contacts, deals, activities	Empty sandboxes teach clicking, not the job.	*		○ Pass ○ Fail	○ Partial ○ N/T
6.2	Stages and required fields mirror production	Drills that pass under looser sandbox rules fail on day one.	*		○ Pass ○ Fail	○ Partial ○ N/T
6.3	Sample data obviously labeled as practice	Practice records that look real end up in forecasts and outbound email.	*		○ Pass ○ Fail	○ Partial ○ N/T
6.4	Reset path for the practice set	Reused sandboxes get messy enough to block the next cohort.	-		○ Pass ○ Fail	○ Partial ○ N/T
7. CERTIFICATION-LITE & SEAT GATING						
7.1	Pass rows written per role	Anything vaguer than a task list becomes attendance tracking.	*		○ Pass ○ Fail	○ Partial ○ N/T
7.2	Signer dates every pass	Undated passes cannot be reconciled against the seat list.	*		○ Pass ○ Fail	○ Partial ○ N/T
7.3	Production seats open only after the pass	Seats granted early are where dirty day-one records come from.	*		○ Pass ○ Fail	○ Partial ○ N/T
7.4	Retake path defined	People who fail once need a route back, or they work around CRM instead.	*		○ Pass ○ Fail	○ Partial ○ N/T

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7.5	Exceptions recorded with an owner and expiry	Emergency access without an expiry date becomes permanent.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8. REINFORCEMENT AFTER LAUNCH						
8.1	Office hours booked in the first hypercare week	The questions that break adoption arrive after launch, not during training.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.2	Manager board coaching scheduled	If the first pipeline reviews run off a private sheet, CRM loses.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.3	One-page references published per role	Small reminders prevent most day-one support tickets.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.4	Feedback route for friction	Stage and required-field problems surface from users first.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
8.5	Plan version frozen for go-live	Two versions of the curriculum mean two sets of habits.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Completion guidance

Pass = done with evidence. Partial = in progress.
Fail = blocked. Not tested = deferred on purpose.

Evidence matters

Note owners, dates, and proof in Evidence / Notes so handoffs stay clear.

Work top to bottom

Finish must-have (*) rows before nice-to-haves.
Do not invent a Pass without proof.