TRAINING NEEDS ASSESSMENT

Salesforce CRM Implementation

Organization	Sales Organization — 200 People
Legacy System	ACT! CRM (8-year deployment)
Go-Live Target	Week 12 of the project start
Role Groups	5 distinct training populations
Document Status	Draft for Review
Prepared By	Learning & Development / Change Management

1. Executive Summary

This Training Needs Assessment (TNA) documents the training strategy, learning objectives, delivery approach, and success criteria required to support the successful adoption of Salesforce CRM across the 200-person sales organization. The organization is transitioning from ACT! CRM — in place for eight years — making this not only a system change but a significant workflow and behavior change initiative.

Five distinct role groups have been identified, each with differentiated training requirements based on the Salesforce features they will use day-to-day. Training must be sequenced carefully over the 12-week implementation window, with Sales Operations and Sales Managers trained ahead of end users to ensure internal support capability is ready at go-live.

⚠ Key Risk
Eight years on ACT! means users have deeply embedded habits. Training alone will not drive adoption — it must be combined with clear changes of communications, executive sponsorship, and visible management reinforcement. This TNA should be implemented alongside a formal Change Management plan.

Training Population at a Glance

Role Group	Count	Primary Training Mode	Hours	Delivery Window

Field Sales Representatives	70	ILT + Mobile Lab	6 hrs	Wks 8–11
Inside Sales Representatives	60	ILT + E-Learning + Sandbox	10 hrs	Wks 8–11
Sales Managers	20	Briefing + Workshop + Coaching	8 hrs	Wks 7–10
Sales Operations	15	Technical Workshops + Admin Access	20+ hrs	Wks 4–11
Customer Success	35	E-Learning + Live Q&A	5 hrs	Wks 10–11
TOTAL	**200**		**~49 hrs delivered**	**Wks 4–12**

2. Scope & Context

2.1 Project Background

The organization is implementing Salesforce Sales Cloud to replace ACT! CRM, which has served as the primary customer relationship management tool for 8 years. ACT! will be decommissioned at go-live. The Salesforce deployment encompasses seven major feature areas across pipeline management, lead automation, quoting, approvals, reporting, mobile access, and ERP connectivity.

2.2 Features Being Deployed

- Opportunity Pipeline Management — end-to-end deal tracking replacing ACT! activity records
- Automated Lead Scoring — algorithmic prioritization of inbound leads (net-new capability)
- Quote-to-Cash Workflow — integrated quoting replacing manual / offline processes
- Salesforce Dashboards & Reporting — replacing ACT! reports and Excel-based tracking
- Mobile App for Field Reps — iOS/Android native app for field activity logging
- ERP Integration / Order Status — real-time order visibility from within Salesforce
- Discount Approval Workflow — structured approval chain replacing ad-hoc email approvals

2.3 Key Change Considerations

ACT! Legacy Factor

Users have 8 years of ACT! habits. Many workflows — activity logging, deal tracking, contact management — are deeply muscle-memory. Training must explicitly surface ACT!-to-Salesforce workflow equivalents, not just teach Salesforce in isolation. "What happened to my [ACT! feature]?" will be the most common question.

- No parallel running: ACT! is decommissioned at go-live, so there is no fallback option for users
- Distributed workforce: Field sales reps are geographically dispersed — virtual delivery and mobile-first materials required

- Sales cycle continuity: Training must not disrupt active pipeline; schedule around quarter-end activities
- Net-new capabilities: Lead scoring and structured approval workflows are entirely new — conceptual training needed before hands-on
- Data migration: Users will need to understand how their ACT! data has been mapped into Salesforce objects

3. Feature-to-Role Training Priority Matrix

The matrix below maps each Salesforce feature to the five role groups and indicates training priority: High (H) = core workflow, trained to proficiency; Medium (M) = regular use, trained to awareness + guided practice; Low (L) = occasional/indirect use, awareness only via job aids.

H = High Priority	Core workflow feature — trained to independent proficiency	**L = Low Priority**	Awareness only — job aid provided
M = Medium Priority	Regular use — trained to guided proficiency with support		

Salesforce Feature	Field Sales	Inside Sales	Managers	Sales Ops	Cust. Success
Opportunity Pipeline Management	H	H	H	H	M
Automated Lead Scoring	M	H	M	H	L
Quote-to-Cash Workflow	H	H	M	H	M
Dashboards & Reporting	M	M	H	H	M
Mobile App (Field)	H	L	M	L	L
ERP Integration / Order Status	M	M	M	H	H
Discount Approval Workflow	H	H	H	M	L

4. Role-by-Role Training Plans

4.1 Field Sales Representatives (70 people)

Training Format	Blended: 4-hour instructor-led workshop + mobile-focused hands-on lab + on-the-job coaching
Duration / Timing	6 hours total | Weeks 8–11

Key Training Needs	• Mobile app navigation and offline functionality • Opportunity and pipeline management (replacing ACT! workflows) • Quote creation and discount approval submission • ERP order status lookup from mobile/desktop • Basic dashboard consumption
Critical Gaps / Notes	High change resistance expected after 8 years on ACT! workflow muscle memory must be rebuilt

4.2 Inside Sales Representatives (60 people)

Training Format	Instructor-led classroom (8 hours) + scenario-based e-learning modules + sandbox practice
Duration / Timing	10 hours total | Weeks 8–11
Key Training Needs	• Lead scoring interpretation and prioritization • Full opportunity lifecycle management • Quote-to-cash end-to-end process • Discount approval submission and tracking • Standard reports and dashboard navigation
Critical Gaps / Notes	Must unlearn ACT! lead tracking habits; lead scoring is net-new concept requiring conceptual training first

4.3 Sales Managers (20 people)

Training Format	Executive briefing (2 hours) + hands-on reporting workshop (4 hours) + 1:1 coaching session
Duration / Timing	8 hours total | Weeks 7–10
Key Training Needs	• Pipeline review and forecast dashboards • Team performance reporting and custom report building • Discount approval workflow — manager role (reviewing/approving) • Coaching using CRM activity data • Exception handling and data quality oversight
Critical Gaps / Notes	Managers need training before reps go live; approval workflow timing is critical path

4.4 Sales Operations (15 people)

Training Format	Deep-dive technical workshops (16 hours) + Salesforce Admin certification prep + sandbox admin access from Week 4

Duration / Timing	20+ hours | Weeks 4–11
Key Training Needs	• Full Salesforce configuration and administration • Lead scoring rule management and tuning • ERP integration monitoring and troubleshooting • Custom report and dashboard creation • User administration, profiles, and permission sets • Data migration validation and clean-up • Approval workflow setup and modification
Critical Gaps / Notes	Sales Ops are the internal Tier 1 support; must be trained well ahead of all other groups; consider Salesforce Admin certification investment

4.5 Customer Success (35 people)

Training Format	Self-paced e-learning modules (3 hours) + 2-hour live Q&A session + job aids / quick reference cards
Duration / Timing	5 hours total | Weeks 10–11
Key Training Needs	• Account and contact management • ERP order status and fulfilment visibility • Case / activity logging • Opportunity visibility (read access for handoff context) • Standard CS dashboards
Critical Gaps / Notes	CS has narrower feature scope; prioritize ERP integration and account views over deep pipeline features

5. Core Learning Objectives by Feature

The following learning objectives apply across all trained role groups at the appropriate depth level. These should form the basis of all assessment questions and completion criteria.

5.1 Opportunity Pipeline Management

- Navigate the Salesforce opportunity record and identify key fields replacing ACT! contact/deal records
- Create, update, and close opportunity records accurately
- Move opportunities through pipeline stages and understand stage entry criteria
- Use pipeline views and filters to manage personal and team workload

5.2 Automated Lead Scoring

- Explain what lead scoring is and how scores are calculated in this deployment
- Identify high-priority leads based on score thresholds and recommended actions
- Update lead records to trigger score recalculation

- (Sales Ops) Configure and adjust lead scoring rules

5.3 Quote-to-Cash Workflow

- Generate a quote from an opportunity record
- Apply pricing, products, and discounts within system constraints
- Submit a quote for approval and track approval status
- Understand the link between approved quote and downstream order creation in ERP

5.4 Dashboards & Reporting

- Navigate the Salesforce reports and dashboards interface
- Run standard reports relevant to role (pipeline, activity, forecast)
- (Managers/Ops) Build and modify custom reports and dashboards
- Export report data and share with stakeholders

5.5 Mobile App (Field Reps)

- Install, configure, and log into the Salesforce mobile app
- Log calls, meetings, and activities from the mobile interface
- Access and update opportunity records offline
- View account maps and route planning features

5.6 ERP Integration / Order Status

- Locate order status information within the Salesforce account/opportunity view
- Interpret order status codes and their business meaning
- Understand data refresh frequency and limitations of the ERP integration
- Know the escalation path when order status data appears incorrect

5.7 Discount Approval Workflow

- Understand discount thresholds that trigger an approval requirement
- Submit a discount approval request correctly from the quote record
- (Managers) Review, approve, or reject discount requests within Salesforce
- Track approval status and communicate outcome to the requesting rep

6. Training Delivery Timeline (12 Weeks)

The timeline below sequences training delivery across the 12-week window. Sales Operations and Sales Managers are trained first to ensure internal capability exists before end-user go-live.

Period	Phase	Key Activities
Weeks 1–3	**Foundation**	Finalize TNA, confirm learning objectives, build curriculum outlines, procure Salesforce sandboxes, identify Training Champions per team

Weeks 4–5	**Content Build**	Develop e-learning modules, instructor guides, job aids, and quick reference cards. Sales Ops sandbox access begins.
Weeks 6–7	**Sales Ops Training**	Deliver full Sales Ops technical training. Admin sandbox configuration. Managers receive early-access briefing on dashboards and approval workflow.
Week 8	**Pilot**	Run pilot session with 10 volunteers (mix of FSR, ISR, CS). Gather feedback. Refine content and delivery.
Weeks 9–10	**Wave 1 Training**	Deliver ILT sessions for Inside Sales and Field Sales (split into groups of 20–25). Managers complete workshop.
Week 11	**Wave 2 / CS**	Customer Success e-learning live. Reinforcement sessions for Wave 1 groups. Help desk go-live readiness check.
Week 12	**Go-Live**	Go-live day. Training Champions deployed to floors. Drop-in help sessions daily for 2 weeks post go-live.
Weeks 13–14	**Hypercare**	Post go-live reinforcement coaching. Track adoption metrics. Address competency gaps with targeted refresher sessions.

Scheduling Note

All Wave 1 training sessions (Weeks 9–10) should avoid the last 3 business days of any calendar month to protect quota-carrying reps during end-of-month close activities. Confirm with sales leadership before finalizing the schedule.

7. Delivery Methods & Training Materials

7.1 Delivery Methods

Method	Description & Usage
Instructor-Led Training (ILT)	Live, facilitator-led sessions in classroom or virtual format. Used for complex workflows requiring discussion and Q&A — pipeline management, quote-to-cash, approval workflows. Recommended group size: 20–25 max.
Hands-On Sandbox Lab	Participants complete guided exercises in a dedicated Salesforce training sandbox populated with realistic data. All ILT sessions should include a 90-minute sandbox lab component. Sandbox must be ready by Week 7.
E-Learning Modules	Self-paced digital modules (15–30 minutes each) hosted in the LMS. Ideal for Customer Success and as pre-work before ILT. Covers awareness-level content and feature overviews.
Job Aids & Quick Reference Cards	One-page laminated or digital reference cards for key workflows: submitting a discount approval, logging a call on mobile, reading order status. Critical for field reps. Delivered at training and accessible in Salesforce sidebar.
Training Champions (Peer Coaches)	Identify 1–2 power users per team who are trained first and serve as embedded floor support during and after go-live. Champions receive an additional 4 hours of advanced training and a champion certification.

Drop-In Help Sessions	Daily 30-minute open Zoom / Teams sessions during Weeks 12–14 (hypercare period) where users can bring real Salesforce questions from their live work.

7.2 Recommended Materials Checklist

- Role-specific facilitator guides (5 versions)
- Participant workbooks with sandbox exercises
- ACT!-to-Salesforce workflow equivalents reference guide
- Mobile app quick start card (Field Reps)
- Discount approval process quick reference card
- ERP order status code glossary
- Post-training knowledge assessment (per role)
- Training Champion Advanced Guide
- Go-live survival guide (Day 1 checklist)
- Salesforce Trailhead module assignments (supplemental)

8. Training Risk Register

The following risks have been identified that could impact training effectiveness or go-live readiness. Each includes a recommended mitigation.

Risk	Likelihood	Impact	Mitigation
Change resistance from long-term ACT! users	**High**	**High**	Involve Sales Champions early; communicate "what's in it for me"; acknowledge ACT! workflow differences explicitly in training
Sales Ops not trained in time to support go-live	**Medium**	**High**	Begin Sales Ops training in Week 4; assign at least 2 internal admins as primary Salesforce contacts before go-live
Manager approval workflow gaps causing deal delays	**Medium**	**High**	Prioritize manager training in Week 7; run end-to-end approval scenario drills before Wave 1
Mobile app adoption lag for Field Reps	**High**	**Medium**	Conduct mobile-specific hands-on lab; provide quick reference card; use peer champions in field teams
ERP integration data unfamiliar to users	**Medium**	**Medium**	Include live ERP data demo in training; document common order status codes with a job aid
Training content not ready by pilot (Week 8)	**Medium**	**High**	Lock curriculum scope by Week 3; assign dedicated content developer; use Salesforce Trailhead to supplement gaps
Low attendance / scheduling conflicts in sales team	**High**	**Medium**	Offer multiple session times; keep ILT sessions under 4 hours; get executive sponsorship for mandatory attendance

9. Success Metrics & Adoption KPIs

Training success will be measured across two horizons: learning outcomes (measured immediately post-training) and adoption outcomes (measured in the hypercare period post go-live).

Success Metric	Target	Measurement Timing
Training Completion Rate	≥ 95% of all 200 users	By go-live (Week 12)
Post-Training Assessment Score	≥ 80% average across all roles	Immediately post training
Learner Satisfaction (CSAT)	≥ 4.0 / 5.0	Immediately post training
CRM Login Rate	≥ 90% of users active in Week 1 post go-live	Week 13
Opportunity Records Updated	≥ 80% of pipeline entered in Salesforce within 2 weeks	Week 14
Approval Workflow Usage	0 discount approvals processed outside system	Week 13 onward
Help Desk Volume Trend	Training-related tickets decline ≥ 30% from Week 13 to Week 16	Weeks 13–16
Mobile App Adoption (FSR)	≥ 75% of Field Reps logging activity via mobile	Week 14

Reporting Cadence

Training completion metrics should be reported to project leadership weekly from Week 8. Adoption metrics (CRM login rate, pipeline data completeness, approval workflow usage) should be reported in a daily flash report during Weeks 12–14, then weekly through Week 20.

10. Recommendations & Next Steps

01 — Appoint a Training Lead immediately

A dedicated Training Lead (or L&D Project Manager) must be assigned this week. With a 12-week timeline and 200 learners, content development must begin in Week 2. Do not wait for full Salesforce configuration to be complete before starting training design.

02 — Secure executive sponsorship for mandatory attendance

Voluntary training attendance in a sales organization will not achieve 95%+ completion. Sales leadership (VP of Sales or CRO) must communicate that training is mandatory, and that go-live access will be gated on completion of the role-appropriate training path.

03 — Invest in Sales Ops certification

Consider sponsoring the Salesforce Administrator Certification (ADM-201) for 2–3 members of the Sales Operations team. The ROI is significant: certified admins resolve issues faster and reduce dependence on Salesforce support contracts.

04 **Build ACT!-to-Salesforce mapping into every session**

Every training session must include a "From ACT! to Salesforce" section that explicitly maps the workflows users know to their Salesforce equivalents. This reduces confusion, resistance, and help desk volume. Consider a dedicated "Goodbye ACT!" module as pre-work.

05 **Populate sandbox with realistic data before Week 7**

Training in an empty sandbox is ineffective. Work with Sales Ops and the Salesforce implementation partner to populate the training sandbox with anonymized or synthetic data that reflects the users' real pipeline, accounts, and lead records.

06 **Plan for ongoing learning beyond go-live**

This TNA covers go-live readiness. Salesforce capability grows over time. Build a 30/60/90-day post go-live training calendar that includes advanced features, refresher sessions, and Trailhead learning paths for motivated users.

Appendix A: TNA Assumptions & Out of Scope

Assumptions

- Salesforce configuration will be feature-complete and stable in the training sandbox by Week 7
- The Salesforce implementation partner will provide a sandbox environment and technical SME support for training delivery
- User data migration from ACT! will be completed before user training begins
- An LMS (Learning Management System) is available or will be procured to host e-learning modules and track completion
- Executive and manager attendance at training is mandatory, enforced by sales leadership
- Training Champions will have their normal quota/workload adjusted during the Champion training period
- Budget is available for external facilitation support for ILT sessions if internal L&D capacity is insufficient

Out of Scope

- Salesforce configuration and technical implementation (owned by Salesforce implementation partner)
- Change management communications plan (a separate but complementary workstream)
- IT infrastructure, SSO configuration, and device management for mobile app
- Post go-live feature enhancements beyond the seven features listed in this TNA
- Salesforce training for IT support team (separate IT training workstream required)