



TRAINING NEEDS ASSESSMENT

CRM Transformation — Salesforce Implementation

System: Salesforce CRM replacing ACT! (8 years in place)

Users: 200 across 5 role groups · Go-live: 12 weeks

Features: 7 Salesforce capabilities mapped against all role groups

Prompt from CM:

"I need to create a training needs assessment. We're implementing Salesforce CRM for our sales organization — about 200 people across 5 role groups: field sales reps, inside sales reps, sales managers, sales operations, and customer success. We're replacing a legacy CRM (ACT!) that's been in place for 8 years.

Here are the key features being implemented: opportunity pipeline management, automated lead scoring, quote-to-cash workflow, Salesforce dashboards and reporting, mobile app for field reps, integration with our ERP for order status, and a new approval workflow for discounting. Go-live is in 12 weeks."

Executive Summary

Replacing ACT! CRM (8 years in place) with Salesforce across the entire sales organization.

30

Training needs
identified

200

Impacted
users

113

Total training
hours

16

High-impact
entries

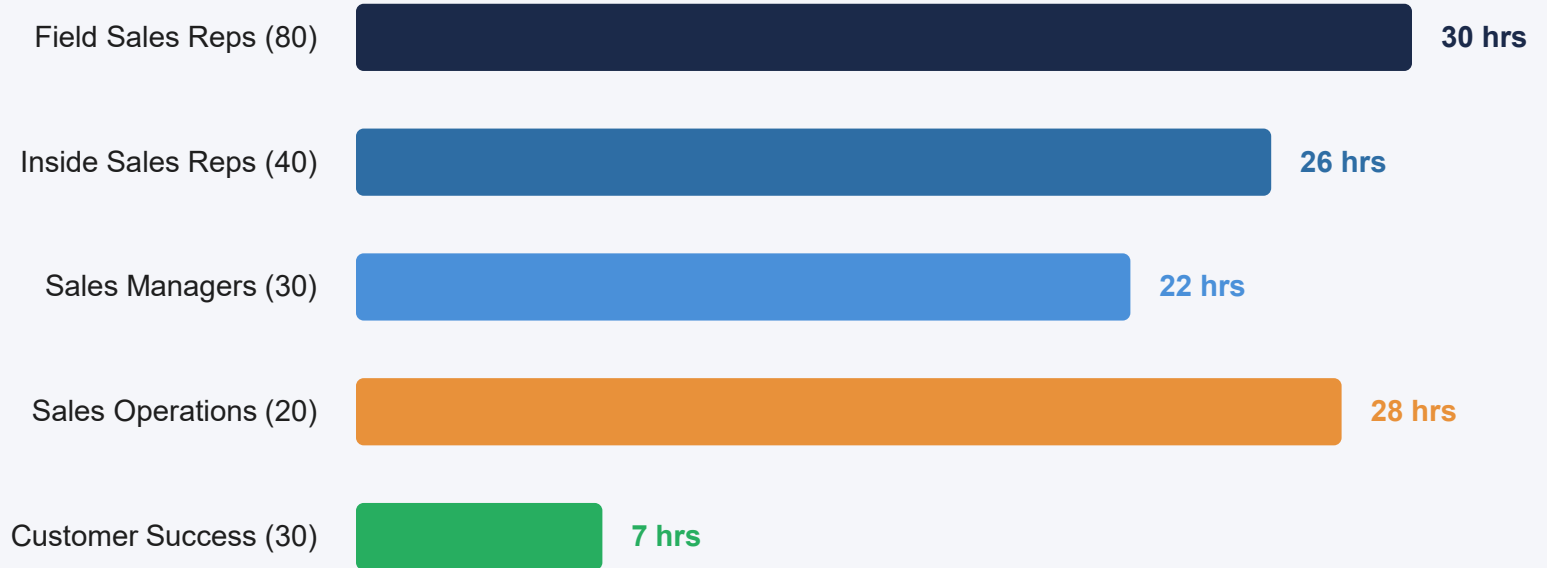
7

Shared
modules

~133

Dev hours
saved

Training Hours by Role Group



Total: 113 hours across 200 users

Feature-to-Role Impact Matrix

	Field Sales (80)	Inside Sales (40)	Sales Mgrs (30)	Sales Ops (20)	Cust. Success (30)
Opportunity pipeline	H	H	H	M	M
Automated lead scoring	M	H	M	H	L
Quote-to-cash	H	H	M	H	L
Dashboards & reporting	M	M	H	H	M
Mobile app	H	L	L	M	L
ERP integration	M	M	L	H	H
Discount approval	H	H	H	H	L

H = High (fundamental change) **M** = Medium (meaningful modification) **L** = Low (minor adjustment)

Shared Training Modules

~133 dev hours saved

7 build-once opportunities identified — training modules that serve multiple role groups with a single development effort.

Module	Role groups served	Hours
Salesforce core navigation	All 5 role groups	2 hrs
Opportunity pipeline (user)	Field Sales, Inside Sales	6 hrs
Quote-to-cash (user)	Field Sales, Inside Sales	6 hrs
Dashboards & reporting (user)	Field Sales, Inside Sales, Sales Mgrs	4 hrs
ERP integration overview	Field Sales, Inside Sales, Cust. Success	2 hrs
Discount approval workflow	Field Sales, Inside Sales, Sales Mgrs	4 hrs
System admin & config	Sales Operations	8 hrs

Key Risks

HIGH

12-week timeline compression

All materials from scratch. Ops training weeks 5–7, end-users weeks 8–11.

HIGH

8-year ACT! habit entrenchment

Deep behavioral patterns. Expect regression weeks 1–4 post-go-live.

HIGH

Sales Ops critical path

Must be trained before end-users. Any delay cascades downstream.

HIGH

No existing training inventory

~200–300 hours of content development needed across all modules.

MED

Discount thresholds not finalized

Materials may need rapid revision. Design modular content.

MED

Lead scoring model credibility

If scores are inaccurate at launch, reps revert to manual methods.

Next Steps

- 1 Curriculum development**
Weeks 1–4 Build training materials for all modules. Prioritize Sales Ops technical content.
- 2 Sales Ops training**
Weeks 5–7 Technical ILT for system configuration, integration monitoring, and admin tasks.
- 3 Train-the-trainer**
Weeks 6–7 Prepare facilitators for end-user ILT delivery. Validate lab exercises.
- 4 End-user training**
Weeks 8–11 Deliver ILT, labs, e-learning, and webinars across all 4 end-user role groups.
- 5 Go-live readiness**
Week 12 Final assessments, job aid distribution, hypercare support plan activation.

30 training needs.

7 shared modules. 133 development hours saved.

One afternoon of work.

The training plan is only as good as the needs assessment behind it.