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COURSE BROCHURE

Advanced CRM Systems Implementation and Administration Course

21 March – 1 April 2027
Online

Advanced CRM Systems Implementation and Administration Course

Ref: 236_7369 **Date:** 21 March – 1 April 2027 **Location:** Online **Fees:** 3200 GBP

CRM Systems Implementation and Administration is a 2-week training course for CRM administrators, IT business analysts and sales operations managers, who leave with a CRM Implementation and Governance Roadmap for their organisation. Many organisations buy capable CRM platforms yet see poor data, low usage and reports nobody trusts within a year of go-live. Jupiter Prime Training delivers CRM Systems Implementation and Administration for the people who configure and run these platforms.

Why CRM Systems Implementation and Administration Matters Now

Three forces shape CRM work today: cloud platforms that release new features several times a year, sales and service teams that expect mobile, automated and connected tools, and leadership that wants a single, reliable view of pipeline and cases. Organisations that implement and administer CRM well gain accurate forecasts, faster case resolution and less manual effort; those that do not end up with duplicate records, spreadsheets beside the system and users who work around it. The course rests on MoSCoW requirement prioritisation, the ADKAR change model and recognised data quality dimensions such as completeness, accuracy and timeliness.

Who Gains Most from CRM Systems Implementation and Administration

- CRM administrators who configure objects, fields, security and automation rules
- IT business analysts who gather requirements and translate them into system design
- Sales operations managers who own pipeline stages, forecasting and territory rules
- Service operations leads who run case queues, entitlements and escalation rules
- Integration specialists who connect CRM with finance, marketing and service platforms

Organisations that send a CRM administrator with a sales or service operations manager gain most, since configuration choices and business processes are then designed together.

CRM Systems Implementation and Administration Capabilities

Participants practise turning business needs into a CRM configuration that users adopt and administrators can sustain release after release.

- Specify CRM requirements with user stories and MoSCoW priorities — steering committees
- Design data models covering accounts, contacts, opportunities and cases — solution architects
- Build automation workflows and approval rules without fragile customisation — CRM administrators
- Test integrations and data migration with reconciliation checks — IT project leads
- Assess user adoption with login, activity and data completeness measures — sales and service leaders
- Apply change control and release management after go-live — CRM governance boards

Key CRM Systems Implementation and Administration Terms

- Data model — the structure of objects, fields and relationships that holds customer information inside the CRM platform.
- Pipeline stage — a defined step in the sales process with entry criteria and probability used for forecasting.
- Case management — the recording, routing and resolution of customer service requests inside the CRM.
- Workflow automation — rules that trigger tasks, updates, notifications or approvals without manual action.
- Data migration — moving and cleansing records from legacy systems into the new CRM platform.
- Sandbox — a separate copy of the CRM used to build and test changes before release to users.

CRM Systems Implementation and Administration Day by Day

Day 1: CRM Platform Landscape and Business Case

- CRM Platform Categories — Sales, Service, Marketing and Industry Clouds
- CRM Business Case — Costs, Benefits and Measures of Success
- Current-State Process Capture — How Sales and Service Work Today
- CRM Vision Statement — Outcomes Leadership Expects From the System
- Stakeholder and Sponsor Mapping — Decision Rights for the CRM Rollout

Day 2: Requirements and Platform Selection

- User Story Writing — Roles, Needs and Acceptance Criteria
- MoSCoW Prioritisation — Must, Should, Could and Will Not Have
- Vendor Evaluation Matrix — Functional Fit, Cost and Support
- Scripted Demonstrations — Testing Vendors Against Real Scenarios
- Licence and Edition Planning — Matching Users to Capabilities

Day 3: Data Model Design

- Core Object Design — Accounts, Contacts, Leads, Opportunities and Cases
- Custom Fields and Validation Rules — Capturing Data Correctly at Entry
- Relationship Types — Lookups, Hierarchies and Junction Objects
- Record Types and Page Layouts — Tailoring Views by Role
- Security Model — Profiles, Roles and Sharing Rules

Day 4: Pipeline and Case Management Configuration

- Sales Process Configuration — Stages, Entry Criteria and Probabilities
- Forecast Categories and Territory Rules — Reliable Revenue Projections
- Case Queues and Assignment Rules — Routing Requests to the Right Team
- Entitlements and Service Levels — Response and Resolution Timers
- Knowledge Articles in CRM — Answers Linked to Case Types

Day 5: Automation and Workflow

- Workflow Rule Design — Triggers, Conditions and Actions
- Approval Processes — Discounts, Contracts and Exceptions
- Email Templates and Alerts — Timely Notifications Without Noise
- Low-Code Flow Builders — Automating Without Heavy Customisation
- Automation Inventory — Avoiding Conflicting and Duplicate Rules

Day 6: Integrations and Data Migration

- Integration Architecture — Point-to-Point, Middleware and API Options
- Finance and ERP Integration — Orders, Invoices and Credit Status
- Marketing Automation Links — Lead Handover and Campaign Attribution
- Data Migration Planning — Mapping, Cleansing and Load Sequencing
- Migration Reconciliation Checks — Proving Records Arrived Complete

Day 7: Data Quality Management

- Data Quality Dimensions — Completeness, Accuracy, Consistency and Timeliness
- Duplicate Management Rules — Matching and Merging Records
- Data Stewardship Roles — Owners for Key Customer Fields
- Data Quality Dashboards — Spotting Gaps Before Reports Mislead
- Enrichment and Validation Services — Keeping Records Current

Day 8: User Adoption and Change

- ADKAR Change Model — Awareness, Desire, Knowledge, Ability, Reinforcement
- Role-Based Training Paths — Sellers, Agents, Managers and Administrators
- Super-User Networks — Peer Support Inside Each Team
- Adoption Metrics — Logins, Activity Logging and Field Completion
- Feedback Loops — Capturing Enhancement Requests From Users

Day 9: Dashboards, Reporting and Governance

- CRM Report Design — Pipeline, Case Ageing and Activity Views
- Executive Dashboards — Forecast Accuracy and Service Performance
- Release Management — Sandboxes, Testing and Deployment Windows
- Change Control Board — Prioritising and Approving Enhancements
- Sector Cases — Distribution Sales Pipelines and Utility Service Cases

Day 10: Practising the CRM Implementation and Governance Roadmap

- Requirements Backlog Review — Applying Day 2 MoSCoW Priorities
- Data Model Walkthrough — Testing Day 3 Design With Peers
- Adoption Plan Check — Day 8 ADKAR Actions per User Group
- Governance Model Draft — Day 9 Release and Change Rules
- CRM Implementation and Governance Roadmap — Phases, Owners, Controls and Measures

Applying CRM Systems Implementation and Administration After the Course

- Run a data quality audit on accounts and contacts using the four dimensions and publish a cleansing plan with named data stewards.
- Set up a change control board that reviews CRM enhancement requests monthly against MoSCoW priorities and release windows.

CRM Systems Implementation and Administration Questions FAQ

What is CRM systems implementation and administration, and why does it matter now?

It is the work of selecting, configuring, integrating and running a CRM platform so sales and service teams rely on it. It matters now because platforms change frequently, users expect automation and leaders want one trusted view of customers.

Which roles gain most from CRM systems implementation and administration training?

CRM administrators, IT business analysts and sales operations managers gain most. Service operations leads and integration specialists also benefit, since case routing, entitlements and connections to finance and marketing systems depend on their design choices.

How does CRM systems implementation and administration differ from a CRM strategy course?

It concentrates on how the platform is built and run rather than on relationship strategy. A strategy course decides lifecycle goals and loyalty economics; here you design data models, automation, integrations, adoption plans and post go-live governance.

What do you bring back from CRM systems implementation and administration training?

You bring back a roadmap for your CRM platform. It contains a prioritised requirements backlog, a reviewed data model, an adoption plan by user group and a governance model for releases and change requests.

CRM Systems Implementation and Administration: The Way Forward

The CRM Implementation and Governance Roadmap first informs which capabilities go live in the next release and who approves later changes. CRM administrators, business analysts and operations managers use it to coordinate configuration, training and data work. After its first use, revisit the adoption metrics, because real usage shows which features need simplification before new ones are added.