

# CRM Horizons Bootcamp

Course Syllabus

InnovateBC • Alacrity Canada

# Course Outline

- Introduction
- Section 1 - CRM Concepts
- Section 2 - CRM Systems
- Section 3 - CRM Selection
- Section 4 - CRM Implementation
- Section 5 - Budget CRM Options
- Section 6 - CRM Application
- Course Exam

# Introduction - Welcome to CRM

- Welcome to CRM
- FAQ & Syllabus
- Unit Reflection - Michael Daykin
- 3 Minutes
- 4 Minutes
- 3 Minutes
- Unit Total: 10 Minutes
- Resource: Downloadable Syllabus

# Section 1 - CRM Concepts

- Introduction to CRM's • 3 Minutes
- What is Customer Relationship Management • 2 Minutes
- The Evolution of CRM • 3 Minutes
- Benefits of a CRM System in Business • 3 Minutes
- Typical CRM Features • 13 Minutes
- Coffee Chat with Kalyn Adams - CRM Core Features Explored • 57 Minutes
- Unit Reflection - Michael Daykin • 4 Minutes

Unit Total: 1 hour 25 minutes

# Section 2 - CRM Systems

- Introduction to CRM Systems
  - Types of CRM
  - Industry Specific CRM Solutions
  - Cloud Based vs On Premise CRM
  - Popular CRM Platforms
  - Coffee Chat with Kalyn Adams - CRM Types & Industries
  - Unit Reflection - Michael Daykin
  - Webinar - Q&A - Kalyn Adams & Chris St-Cyr
- 3 Minutes
  - 10 Minutes
  - 4 Minutes
  - 3 Minutes
  - 4 Minutes
  - 73 Minutes
  - 4 Minutes
  - 44 Minutes

Unit Total: 2 hours 25 Minutes

# Section 3 - CRM Selection

- Introduction to CRM Selection
  - Needs Assessment Planning
  - Vendor Comparisons
  - Required 3rd Party Integrations
  - Data Security Requirements
  - Pricing Comparisons
  - Coffee Chat with Kalyn Adams - Needs Assessment Walkthrough
  - Unit Reflection - Michael Daykin
- 3 Minutes
  - 12 Minutes
  - 5 Minutes
  - 5 Minutes
  - 6 Minutes
  - 4 Minutes
  - 20 Minutes
  - 10 Minutes

Unit Total: 1 hour 5 Minutes

- Resource List - Popular Examples of Companies That Integrate with CRM's
- Resource - Needs Assessment Template (Downloadable)

# Section 4 - CRM Implementation

- Contact & Lead Management
  - Marketing Integrations
  - Pixel or Script Setup
  - Company Training & Adoption Policies
  - Connecting Integrations
  - Data Migration
  - Unit Reflection - Michael Daykin
  - Coffee Chat With Kalyn Adams - Intergrations
- 3 Minutes
  - 10 Minutes
  - 3 Minutes
  - 4 Minutes
  - 4 Minutes
  - 5 Minutes
  - 5 Minutes
  - 26 Minutes

Unit Total: 1 hour

# Section 5 - Budget CRM Options

- Free CRM Option
- Open Source CRM Options

- 3 Minutes
- 3 Minutes

Unit Total: 6 Minutes



# Section 6 - CRM Application

- Getting Started With The CRM Interface
  - CRM Features & How To Utilize Them
  - CRM Data Analysis
  - CRM Maintenance
  - Webinar - Wrap Up
  - Outro Conclusion
- 13 Minutes
  - 18 Minutes
  - 20 Minutes
  - 5 Minutes
  - 45 Minutes
  - 2 Minutes

Unit Total: 1 hour 43 minutes

**Final Quiz - 80% Passing Grade Required**