



Service Definition – CRM Training

Service Definition: CRM Training – GOV.UK Digital Marketplace

1. Service Overview

Cantata provides vendor-independent CRM training to upskill public-sector teams in Microsoft Dynamics 365 Customer Engagement, Salesforce, and CRM fundamentals. Training is delivered onsite or virtually, aligned to your CRM environment and workflows. It includes curated curricula for end users, super users/admins, product owners, analysts, and service managers, with embedded knowledge transfer to reduce reliance on suppliers.

2. Service Scope

- Role-based curricula: End-user essentials, Service/case management, Super-user/Admin, Product owner/BA, Contact centre modules
- Platform-specific training: Dynamics 365 CE (Sales, Customer Service, Case Management, Power Platform basics); Salesforce (Sales Cloud, Service Cloud)
- Adoption & change: train-the-trainer, floor-walking, UAT support, micro-learning content
- Data quality & governance: standards, deduplication, privacy and retention
- Reporting & MI: building views, charts, dashboards, exporting and data hygiene
- Accessibility & inclusion: materials designed to meet diverse learner needs

3. Outcomes & Deliverables

- Training needs analysis and role-based learning plan
- Instructor-led sessions (virtual/onsite) and hands-on labs
- Learning assets: slide decks, exercises, cheat-sheets, guides, recordings (where permitted)
- Knowledge transfer plan and evaluation report

4. Typical Use Cases

- New CRM rollouts or upgrades needing rapid user readiness
- Contact-centre and case-management teams adopting omnichannel and SLAs
- Field services or inspections teams adopting mobile CRM
- Data stewards and analysts improving reporting and data quality
- Product owners and super users scaling self-service configuration

5. Approach & Methodology

Discover → Design → Deliver → Embed

- Discover: stakeholder interviews; assess processes, personas, accessibility needs

- Design: role-based curricula, learning objectives, labs and scenarios tailored to your configuration
- Deliver: blended learning (instructor-led, hands-on labs, micro-learning videos, Q&A clinics)
- Embed: train-the-trainer, floor-walking, digital guidance, office hours, adoption nudges

6. Onboarding & Offboarding

Onboarding: kick-off; access to CRM sandbox/tenant; agree timetable, audience, success metrics. Offboarding: final report; handover of all learning materials and recordings; coaching for internal trainers; optional follow-up clinics.

7. Availability, SLAs & Governance

- Lead time: training can start within agreed timescales; typical course design 2–4 weeks post kick-off
- Delivery windows: UK business hours; evening sessions available by arrangement
- Cadence: weekly status update; RAID log maintained across the engagement

8. Security, Privacy & Accessibility

Data handling adheres to client information-security policies and UK GDPR; training environments use non-production/sanitised data. Materials available in accessible formats; inclusive facilitation practices; recordings provided subject to policy.

9. Dependencies & Constraints

- Timely access to CRM sandbox and representative user stories
- Availability of delegates for scheduled sessions; minimum/maximum cohort sizes per class
- Confirmed rules regarding recording and storage of sessions

10. Pricing

Time-and-materials with options for fixed-price training packages by cohort/role. Discounts for multi-cohort programmes and train-the-trainer bundles. T&E charged at cost.

11. Team & Roles

- CRM Trainer / Functional Consultant: delivers role-based training and labs
- Solution Architect: shapes scenarios, ensures platform correctness
- Business Analyst: translates processes into learning outcomes and exercises
- Project Manager: schedules, logistics, stakeholder comms, RAID

12. Evidence & Case Studies

Available on request

13. Why Cantata

- Independent and vendor-neutral; training tailored to your processes
- Role-based, hands-on learning aligned to public-sector casework and citizen service
- Knowledge transfer first: reduce supplier dependence and improve adoption
- Marketplace-ready service definition: structured for buyer comparison

14. Contact

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