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CRM Certification: When it Does and Does Not Matter

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Certification programs for administrators and developers go back to the days when the mainframe was young, so it's not surprising to see these courses and tests showing up for CRM systems now. It's a sign of competency in one technology or another — so what?

In technology infrastructure products (such as network or OS), certification might well be dismissed as a "nice to know." But in applications that are evolving rapidly, certification is an ongoing process that must be renewed at least once a year (in the case of Salesforce.com's program, it's four times a year). This is because not only are things changing fairly quickly in the application features and use-cases, the object model and APIs are being extended on a regular basis. Somebody who wasn't keeping their certification up is more likely to do something the hard way (through custom code or an external Web service) even though there's a new internal capability that could get the job done for free.

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Further, certification is enough of a pain (20 hours or more per year of non-billable time) that it's a good indication of the commitment and focus on the consultant's part. As there may be several levels of certification to complete, the test fees and unbillable hours easily amount to thousands of dollars. Typically, an individual consultant can afford to be certified on only one of the CRM systems.

What to Check For

A classic game played by consultancies is to have only a small portion of their consultants certified. The firm will claim "vendor certified," but that's no guarantee that the individuals working on your project will be.

While it's overkill to insist that everyone on your project be certified, it is essential to have at least one certified consultant on your project. You will likely pay a little more for this, but it's cheap insurance against expensive missteps with the CRM technology. That said, most vendors focus their tests on the most advanced features and "full-feature" editions of their products. Consequently, if you're using an entry-level version, don't expect the certified consultant to know everything about working with your stripped-down version. This principle goes double for down-rev versions of on-premises CRM systems.

Certification programs vary considerably, so you'll need to investigate the vendor's specific certification levels and their terminology. You'll find that the following generalities apply:

- **Certified administrators** are what most projects will need. It really speeds the project along to have one when you're implementing or expanding the use of CRM features. Nobody has any public statistics on this, but my guess is that less than only about 20% of individual consultants earn this certification.
- **Certified consultants** may have more product knowledge than certified administrators, but the technical depth is highly variable. I don't know of a situation where a certified consultant is any more valuable to a project than a certified administrator. You can probably ignore this level.
- **Certified developers** should have very different knowledge than certified administrators. While their knowledge of the system's platform and object model will be much deeper than an administrator's, the administrator will probably know some money-saving tricks at the application level that the developer may not. If your project involves a small amount of coding, there's not much point in insisting upon a certified developer. But if you expect major chunks of development, the extra knowledge of the certification will more than pay for itself in avoided waste, wrong turns, and downright crummy code. I don't know of any public statistics on this, but I doubt that more than 10 percent of individual

consultants earn this level of certification.

Of course, certification processes can only test for knowledge: not skill, aptitude, or effectiveness. That, you have to test for yourself through interviews and reviews of previous work. If your consultant doesn't have any examples of their work, this is a serious red flag.

Do you need your staff to be certified? Technical education and certification can never hurt and they can be a nice motivator for your own staff. Further, by having staff that's knowledgeable about the whole CRM platform, they may make smarter decisions about how to leverage the system. Even so, it's not very likely that you'll get that much extra value from certified employees. The reason? Most CRM customers leverage only a small portion of the overall platform and applications, and the information gained from certification programs is use-it-or-lose-it. Six weeks after certification, your staff members will have forgotten the majority of what they learned because they really remember only those areas of the system they work on.

David Taber is the author of the new Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

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