

## The 3 Day CRM Implementation Project for up to 5 Users

One of our experienced Consultants will get your licensed users up and running with 3 continuous days of focused training and knowledge transfer including user set up and configuration. We will provide hands-on training & practice onsite using your own application.

### Agenda

#### Days One to Three

- Detailed Workshop of your business organisation and line of business – driven by a BPR questionnaire
- Relationship Management Workshop
  - Managing Prospects, Accounts, Contacts and their related activities
- Security - User set up and administration
  - Sharing and access to data – Roles, Profiles & GDPR
  - Administrator and Users setup
- The Home Tab – Dashboard KPI's, Tasks, Search, Filters and Views
- Activities – Managing Tasks, Events and Calls
- Managing Emails & how to create email templates
- Managing Accounts & Contacts
- Campaigns
- Sales - Progressing and converting Leads (including Web to Lead)
- Sales Pipeline - Creating Deals & Opportunities
- Creating Quotes using Products & Pricing
- Customer support and managing customer Cases (including Web to Case)
- CLIQ – your own social network for staff and third parties
- Page Layouts & Pick Lists
- Creating & Using Mail Merges
- Importing Accounts and Contact information using the import wizards
- Sourcing quality information – overview of Reports and Dashboards
- System Administration & End User Training
- Application Review and Go-live plus a final question & answer session

### Cost

€2100 Fixed Price plus VAT – price includes project management and 1 month post project remote support.

**Note - the content may vary based upon the license edition.**

**Payment terms – 50% on contract signing and 50% at the end of the project.**

### Further Information

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