The 7 Day CRM Implementation Project for up to 10 Users

One of our experienced Consultants will get your licensed users up and running carrying out requirements gathering workshops, application configuration & set up, focused training and knowledge transfer. We will provide hands-on training & practice onsite using your own application as well as 1 day of on-site support once you have gone live.

Agenda

Days One to Seven

- 2 Detailed Workshops of your business organisation and lines of business – driven by our BPR questionnaire
- Relationship Management Workshop
    - Best practice in managing Prospects, Accounts, Contacts and their related activities
- System Configuration
    - Security - User set up and administration
    - Sharing and access to data – creating Roles & 4 Profiles (Sys Admin, Director, Manager, User)
    - GDPR – set up & training
- The Home Tab – Dashboard KPI's, Tasks, Search, Filters and Views
- Activities – Managing Tasks, Events and Calls
- Managing Emails & how to create email templates
- Progressing, scoring and converting Leads (including Web to Lead)
- Managing Accounts & Contacts
- Campaigns
- Creating Deals & Opportunities – Sales Pipeline & Qualification
- Creating Quotes using Products & Pricing
- Customer support and managing customer Cases (including Web to Case)
- Configuring Screens - Page Layouts & Pick Lists
- Creating & Using Mail Merges
- Creating 1 Workflows & 1 Approvals
- Importing Accounts and Contact information using the import wizards
- Reports and Dashboards
- System Administration, Manager & End User Training
- Application Review and Go-live plus a final question & answer session
- Post Implementation Onsite Support

Cost

€4500 Fixed Price plus VAT – price includes project management and 1 month post project remote support.

Note - the project content may vary based upon the license edition.
Payment terms – 50% on contract signing and 50% at the end of the project.

Further Information

Tim Pullen, Chief Executive Officer   +353 866 044 820   tim.pullen@cloudtech.ie

---