Customer Relationship Management Training

[Play Video]

Company:_____________________________ **Signed:**______________________________

Name:____________________ **Position:**_______________ **Date:** ______________

Trainee to complete: Please tick

1. [ ] **Source Tracking**
   Do you know how to create a new Source and assign an Expense Account and Est Cost?

2. [ ] **Source List**
   Do you know where to view the Source List?

3. [ ] **Defining Customers**
   Where do you assign a Source to a Customer?
   Do you know where to locate the Preference to force the entry of a 'Source' when creating a new Customer?

4. [ ] **Source Tracking**
   What is the benefit of creating an appointment for a Customer that has a source assigned?

5. [ ] **Adjusting Enquiries**
   Do you understand how to make an enquiry?

6. [ ] **Leads**
   What is the relationship between Source and Leads?

7. [ ] **Leads Video**
   Have you watched the Leads video?

8. [ ] **Mail Merge**
   Can you correctly use the Mail Merge Function?

9. [ ] **Emails and Spam**
   Why do you have to be extra careful about the amount of emails you send to 1 Customer?

10. [ ] **Mail Merge Customers**
    Are you aware of how to send bulk mail merged information by email and the need to use a Mass Mail Company for sending?

11. [ ] **Mail Merge Template**
    Do you know where to locate and adjust the mail merge document template?

12. [ ] **Loyalty Setup**
    Do you know how the Loyalty Program works?

13. [ ] **Loyalty Video**
    Have you watched the loyalty video?

14. [ ] **Reward Points Assigned**
    How do you manage the Points against Products?

15. [ ] **Displaying Points**
Do you know where to find the reward points on an invoice?

16. [ ] **POS Points**
What is the main point to be remembered in this section?
What do you have to put in before any points can be assigned?

17. [ ] **Redeeming POS**
Points
Can you define your points to a product both singularly and Multiple?

18. [ ] **Showing**
Customer Points
Can you keep checks on what points are still available to Customers?

19. [ ] **CRM Reports**
Do you know how to use CRM reports?

20. [ ] **CRM, Marketing and Leads**
Have you watched the video and do you understand it?

21. [ ] **FeedBack Reports**
Where is the main area your feedback comes from?

22. [ ] **Customer History**
Do you know where to view Customer History?

23. [ ] **Customer Contacts**
Are you able to enter Customer Contact details?

24. [ ] **Contact Correspondence**
Can you send correspondence from within the Contact Tab?

25. [ ] **New Contacts**
Do you know how to add a new contact?

26. [ ] **Customisable Fields**
What can you track with customisable fields?

27. [ ] **Follow Ups**
What do you enter into your follow ups?

28. [ ] **Global List**
What does your Global List contain?

Notes:
Are there any aspects in this area that more training would be useful?