Marketing Training

[Play Video]

Company:______________________________ **Signed:**______________________________

Name:_____________________ **Position:**_______________ **Date:** ______________

Trainee to complete: Please tick

1. [ ] **CRM, Marketing and Sales**
   Do you understand how the CRM and Marketing modules link directly to Sales?

2. [ ] **Leads Module**
   Do you understand that a Lead is the key marketing tool for Sales integration?

3. [ ] **Marketing Reports**
   What are the primary Ratio Reports in relation to Marketing?

4. [ ] **Marketing Contact**
   What is the basic concept of a Marketing Contact and where does it link to?

5. [ ] **Prospects To Customers**
   How is a Prospect created and how does a Prospect become a Customer?

6. [ ] **Telemarketing**
   What is the main purpose of the Telemarketing section?

7. [ ] **Contact Range Selection**
   What is the Contact Selection Range used for and what does it link to?

8. [ ] **Telemarketing Selection**
   Where does the Telemarketing data feed from, and where does it feed to?

9. [ ] **New Lead**
   What are the different ways to create a Lead?

10. [ ] **Edit Lead**
    Within the Lead screen, how do you load the editable screen?

11. [ ] **Actions**
    What is an example of an "Action"?

12. [ ] **Follow Up**
    How do you set a Follow Up with notes assigned?

13. [ ] **Reminder Pop Up**
    How do you set your Reminders to pop up automatically upon logging into ERP?
    How do you action the Reminder when it pops up?

14. [ ] **Sales Pipeline**
    What information is available on the Sales Pipeline Report?

15. [ ] **Lead Status**
How do you assign a Status to a lead?
Where do you create your 'Status' list?

16. [ ] **Appointment**
How do you create an Appointment from a Lead?

17. [ ] **Appointment Notes**
What happens to any notes added to an Appointment, i.e. where else do they display?

18. [ ] **Main Calendar**
What are some of the key benefits of the Main Calendar?

19. [ ] **Itinerary**
Where can you print a Reps Itinerary from?

20. [ ] **Email Appointments**
How do you email an Appointment Itinerary to a Rep?

21. [ ] **Email Information**
From where do you create an email to send to a Lead?

22. [ ] **Marketing Reports**
How do you access the Marketing Action List and what is the benefit of this List?

23. [ ] **Quote**
How do you create a Quote directly from a Lead?

24. [ ] **What It Took**
Where would you look to find out "What It Took" to gain a new Customer?

25. [ ] **Sales Pipeline**
Review the Sales Pipeline Report for up-to-date reporting on any Lead and/or Rep.

26. [ ] **Converting Quote**
Where would you find the Quote created from the Lead, and how would you convert it to a Sales Order?

27. [ ] **Sales Order**
What happens to a Sales Order at the point of conversion from a Quote?

28. [ ] **Reflected in Lead**
What data is recorded against the Lead after the Quote is converted to a Sales Order?

29. [ ] **Invoice**
How do you create an Invoice directly from a Lead?

30. [ ] **Ratios**
Where can you access the Sales Ratios Report?
What beneficial information does this Report contain?

31. [ ] **Just Leads**
Do you understand that by utilising *just* the Lead screen, a Customers inception is fully tracked?

32. [ ] **Print Reminders**
Where is the "Print Reminders" button located and what is its primary benefit?

33. [ ] **Contact To Customer**
Can you now see how using the Marketing module efficiently can take you from a Marketing Contact to a Customer with a complete record of what it took to get there?

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