

The 12 Day CRM Implementation Project for up to 20 Users

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 Twelve

- Roadmap Workshop – Strategic session looking at where you would like to be in 18 months and how to get there
- 2 Detailed CRM Workshops of your business organisation and lines of business – driven by our BPR questionnaire
 - Swim lane diagram of your sales process (Lead to Invoice)
- Relationship Management Workshop
 - Best practice in managing Prospects, Accounts, Contacts and their related activities
- System Configuration
 - Security - User set up and administration (Roles, Territories etc.)
 - Sharing and access to data – creating Roles & 5 Profiles (Sys Admin, Director, Manager, Team Lead, User)
 - GDPR – set up & training
- Importing Account, Contact & Product information using the import wizards
- The Home Tab – Dashboard KPI's, Tasks, Search, Filters and Views
- Activities – Managing Tasks, Events and Calls
- Managing Emails & how to create email templates
 - Outlook plugin
- Progressing, scoring and converting Leads (including Web to Lead)
- Managing Accounts & Contacts
- Campaigns : Online & Offline
- Creating Deals/Opportunities – Sales Pipeline & Qualification, Validation & Approvals
- Creating Quotes & Invoices using Products & Pricing
- Customer support and managing customer Cases (including Web to Case)
- Configuring Screens - Page Layouts & Pick Lists
- Creating & Using Mail Merges
- Creating 4 Workflows & 2 Approvals
- Reports, Report Scheduling and Dashboards – creating 3 Reports (inc. Charts), 1 Dashboards & 2 Components
- System Administration, Manager & End User Training
- Application Review and Go-live plus a final question & answer session
- 1 day Post Implementation Onsite Support

Cost

€7500 Fixed Price plus VAT – price includes project management and 6 weeks 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

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