CRM TRAINING PACKAGE

INCREASING MEMBER/PARTNER ENGAGEMENT

This is an interactive course for those who handle Membership/Partnership Relations on your DMO team. Gain hands-on experience overseeing the management of your destination's members and partners in the Simpleview CRM.

TOPICS

- Developing robust Listings
- Promoting upcoming Events
- Tracking In kind/Expenses
- Other essential details of the membership/partnership relations job role

DURATION

Trainings will be
a total of 3 days

LOCATION

On-site at client's office or
Simpleview's Tucson or Pittsburgh
offices

BEFORE THE TRAINING

We highly recommend that students participate in our CRM Overview online course in the Brainery and take the associated exam before the on-site training session, as it will provide a solid understanding of basic Simpleview CRM concepts and functionality. Going through the material will provide the smoothest training experience possible.

MODULES & TOPICS

ACCOUNT DEVELOPMENT

- Navigating Accounts
- Using Account Filters
- Modifying the Grid Settings
- Adding a New Account
- Merging Accounts
- Creating and Using Account Tags
- Geo-Coding Accounts
- Using Account Recaps
- Creating/Editing/Deleting Account Statuses
- Importing Accounts*

CONTACT DEVELOPMENT FOR ACCOUNTS

- Navigating Contacts
- Using Contact Filters
- Modifying the Grid Settings
- Adding a New Contact
- Merging Contacts
- Creating and Using Contact Tags
- Viewing a Contact’s Permission Report
- Handling Orders
- Giving Access to Extranet
- Creating/Editing/Deleting Contact Types
- Contact Security Roles

CREATING LISTINGS FOR ACCOUNTS

- Navigating Listings
- Using Listing Filters
- Modifying the Grid Settings
- Adding a New Listing
- Creating and Using Listing Tags
- Creating/Editing/Deleting Listing Categories, Subcategories, Ranks and Types
- Use Overwrite Fields
- Creating and Using Partner Referral Contacts

ADDING LISTINGS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Listings Widgets to a Page

USING TRACES FOR ACCOUNTS*

- Navigating Traces on the Account Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History for an Account
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Trace Data

CREATING COUPONS FOR ACCOUNTS

- Adding a New Coupon
- Creating/Editing/Deleting Coupon Categories
- Approving/Denying Pending Coupons

ADDING COUPONS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Coupon Widgets to a Page

ADDING MEDIA TO ACCOUNTS AND LISTINGS

- Adding a New Logo/Image
- Best Practices with Displaying Listing Images

CREATING EVENTS FOR ACCOUNTS*

- Navigating Events
- Using Events Filters
- Modifying the Grid Settings
- Adding a New Event
- Approving/Denying a Pending Event
- Creating/Editing/Deleting Event Categories and Ranks

ADDING EVENTS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Events Widgets to a Page
- Reviewing the 'Submit an Event' Form

CREATING AMENITIES FOR ACCOUNTS

- Adding/Editing/Deleting Amenity Data on Accounts
- Understanding Differences Between Amenities, Tabs and Groups
- Developing New Amenities/Tabs/ Groups in Admin

ADDING AMENITIES TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Reviewing Amenities on the Listing Detail
- Using Amenity Filters on the Listing
- Widgets

REVIEWING AND USING THE BENEFITS SUMMARY

- Adding In kind/Expenses
- Creating/Editing/Deleting In kind
- Expense Types and Payment Types
- Reviewing Leads Sent to an Account
- Reviewing Service Requests Sent to an Account
- Pulling Summary Reports on Events for an Account
- Reviewing Article Mentions for an Account
- Reviewing Web Site Data and Coupon Hits for an Account
- Reviewing Promotions/Advertising Associated with an Account
- Reviewing Involvement with FAMs and Site Inspections

ADDING INVOICES TO YOUR ACCOUNTS*

- Navigating Invoices
- Using Invoices Filters
- Modifying the Grid Settings
- Reviewing Dues Information for an Account
- Adding Dues for an Account
- Adding Blank and Dues/Benefits Invoices to an Account
- Generating and Printing Statements
- Using the Dues Revaluation Tool
- Creating/Editing/Deleting Invoice Payment Types

ADDING PARTNER REFERRALS TO YOUR ACCOUNTS

- Navigating Partner Referrals on the Account Detail
- Adding a New Partner Referral
- Referral Contacts
- Sending Partner Notifications

ADDING NOTES TO AN ACCOUNT

- Navigating Notes on the Account Detail
- Adding a New Note
- Adding/Updating Note Categories
- Searching for Notes
- Printing Notes

ADDING COMMUNICATIONS TO AN ACCOUNT

- Reviewing Communications for an Account on the Account Detail
- Using Communications Filters
- Sending a Communication
- Developing Templates for Communications
- Using the Email Bounce Log

PULLING MEMBER/PARTNER DATA INTO REPORTS – FUNDAMENTALS

- Viewing Reports
- Using Reports Filters
- Modifying the Grid Settings
- Using Standard Reports to Get Information
- Creating Simple Reports

PULLING MEMBER/PARTNER DATA INTO REPORTS | ADVANCED TECHNIQUES*

- Creating Summary Reports
- Creating Summary Detail Reports
- Creating Cross-Tab Reports
- Scheduling Reports
- Sharing and Installing Reports

USING SEARCH TO FIND MEMBER/PARTNER DATA

- Navigating Saved Searches
- Using Searches Filters
- Developing a New Search
- Conducting a Global Search

USING ADMIN FEATURES TO ENHANCE MEMBER/PARTNER DATA AND WORKFLOWS

- Working with Custom Fields
- Reviewing and Developing Security Roles
- Developing Triggers
- Restoring Content in the Recycle Bin
- Managing Dropdowns

DEVELOPING FORMS FOR MEMBER/PARTNER DATA

- Using the Form Builder for Member/Partner Data
- Best Practices with Collecting Data, Preventing Duplicates

CONNECTING MEMBER/PARTNER DATA TO YOUR MEMBERS AND PARTNERS VIA THE EXTRANET

- Logging into the Extranet
- Navigating the Extranet
- Using the Post Board
- Creating and Reviewing Partner Bulletins
- Using the Layout Manager
- Setting up Extranet Emails
- Using the Extranet Image Carousel

* Optional by Trainer's Discretion - This cannot be removed from a training engagement unless the trainer chooses to do so because the client does not use this CRM feature/section.

** Optional - This can be removed if a client does not have our Simpleview CMS and is not interested in purchasing it.

Questions?

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