



# CRM TRAINING PACKAGE

## CRM ESSENTIALS FOR NEW AND EXPERIENCED USERS

Comprehensive and hands-on, this is the core training that ensures your success with the Simpleview CRM. It is a must for new users, but also a beneficial refresher for those who are ready to significantly ramp up their skills and knowledge about using the Simpleview CRM to solve their most pressing challenges. **We recommend users take this course before starting to use the Simpleview CRM, whether in a new system or one that has been established at their organization for many years.**

### DURATION

Trainings will be a total of 5 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

## MEMBER/PARTNER USER GROUP

- Client will work with the assigned Simpleview instructor to assign up to five hours of training on the Member/ Partner user group from our list of available units.

## USING YOUR SIMPLEVIEW EXTRANET

- The entire Simpleview Extranet will be covered for the trainees in this training engagement.

## MEETING SALES/USER GROUP

- Client will work with the assigned Simpleview instructor to assign up to eight hours of training on the Meeting Sales user group from our list of available units.

## GROUP TOUR AND TRAVEL USER GROUP

- Client will work with the assigned Simpleview instructor to assign up to four hours of training on the Group Tour and Travel user group from our list of available units.

## CONSUMER USER GROUP

- Client will work with the assigned Simpleview instructor to assign up to three hours of training on the Group Tour and Travel user group from our list of available units.

## MEDIA / PR

- Client will work with the assigned Simpleview instructor to assign up to two hours of training on the Media/PR user group from our list of available units.

## EVENTS / RSVP

- Client will work with the assigned Simpleview instructor to assign up to two hours of training on the Media/PR user group from our list of available units.

## ADMIN

- Client will work with the assigned Simpleview instructor to assign up to two hours of training on the Admin sections of the covered User Groups from our list of available units.

## SEARCHES AND REPORTS

- Client will work with the assigned Simpleview instructor to assign up to four hours of training on the Reports and Search sections of the covered User Groups from our list of available units.

## OPEN Q&A

## Questions?

Contact [accountmanagers@simpleviewinc.com](mailto:accountmanagers@simpleviewinc.com)  
or **520.575.1151**

