CRM TRAINING PACKAGE

MEDIA AND PUBLIC RELATIONS DATA MANAGEMENT ESSENTIALS CLIENT TRAINING

This training is a must for those who handle public relations and media relations roles within your organization.

TOPICS

- Managing blogger and reporter contact information
- Logging article placements in targeted media outlets
- Tracking lead opportunities
- And more

DURATION

Trainings will be
a total of 2 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

Any sections of the training that are not listed as 'Optional' and/or 'Optional by Trainer's Discretion' cannot be removed from a training engagement.

PUBLICATION DEVELOPMENT

- Navigating Publications
- Using Publications Filters
- Modifying the Grid Settings
- Adding a New Publication
- Merging Publications
- Creating and Using Publication Tags
- Creating/Editing/Deleting Media Mediums
- Using the VOCUS Import tool

CONTACT DEVELOPMENT FOR PUBLICATIONS

- Navigating Contacts
- Using Contact Filters
- Modifying the Grid Settings
- Adding a New Contact
- Merging Contacts
- Creating and Using Contact Tags
- Creating/Editing/Deleting Contact Types
- Linking Tour/Travel Contacts to Related Records in Other User Groups
- Navigating Traces on the Account, Contact, Lead and Service Request Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Traces

ADDING COMMUNICATIONS TO TO A CONTACT, LEAD, ARTICLE AND SERVICE REQUEST

- Reviewing Communications for an Article on the Article Detail
- Reviewing Communications for a Lead on the Lead Detail
- Reviewing Communications for a Service Request on the Detail
- Using Communications Filters
- Sending a Communication
- Developing Templates for Communications
- Using the Email Bounce Log

CREATING LEADS FOR CONTACTS

- Navigating Leads
- Using Leads Filters
- Modifying the Grid Settings
- Adding a New Lead
- Adding properties via Facility Search
- Creating and Using Lead Tags
- Creating/Editing/Deleting Lead Statuses and Types
- Providing Details for Lost Leads
- Sending the Lead
- Closing the Lead

REVIEWING THE LEAD DETAIL AND HANDLING RESPONSES

- Viewing Data on Properties that Received the Lead
- Viewing Room Summaries
- Viewing Tracking/History and Lead Audit Details on the Lead
- Reviewing Responses to a Lead
- Using Response Filters
- Adding a New Response
- Editing and Deleting an Existing Response
- Printing Response Data
- Exporting Reponse Data as a .CSV File
- Creating a .PDF Summary of Responses
- Compiling Attachments from Responses as a .ZIP File
- Viewing Missing Response Logs

CREATING ARTICLES

- Creating Articles
- Tracking Article Performance
- Connecting to Partners
- Notifying Mentioned Partners

ADDING PARTNER REFERRALS TO YOUR ACCOUNTS AND LEADS

- Navigating Partner Referrals on the Account and/or Lead Detail
- Adding a New Partner Referral to an Account and/or Lead
- Using Partner Referral Filters on the Account and/or Lead Detail

ADDING INKIND/EXPENSES TO YOUR ACCOUNTS

- Navigating Inkind/Expense on the Account and/or Lead Detail
- Adding a New Inkind/Expense to an Account and/or Lead
- Using Inkind/Expense Filters on the Account and/or Lead Detail

ADDING SERVICE REQUESTS TO YOUR ACCOUNTS

- Navigating Service Requests
- Using Service Requests Filters
- Modifying the Grid Settings
- Adding a New Service Request to an Account and/or Lead
- Sending Communications to Partners Receiving Service Requests
- Reviewing Extranet Settings around Service Request Contact Permissions

ADDING NOTES TO YOUR ACCOUNTS AND LEADS

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

PULLING MEDIA/PR DATA INTO REPORTS – FUNDAMENTALS

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

PULLING MEDIA/PR 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 MEDIA/PR DATA

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

USING ADMIN FEATURES TO ENHANCE MEDIA/PR DATA AND WORKFLOWS

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

USING MOBILE CRM TO REVIEW MEDIA/PR DATA

- Reviewing Traces
- Reviewing Details on an Account, Contact, Lead and/or Service Request
- Using the Mobile Navigation
- Bookmarking Content
- Account Management
- Sending Email

* 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?

Contact **accountmanagers@simpleviewinc.com**

or **520.575.1151**

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