CRM TRAINING PACKAGE

OPTIMIZING MEETING SALES & SERVICES OPERATIONS

This is an interactive course for those who handle Meeting Sales and/or Services on your DMO team. Gain hands-on experience overseeing the management of your convention and event sales and services efforts in the Simpleview CRM.

TOPICS

- Communicating with planners/organizers
- Managing Leads and Commitments to deliver on sales promises
- Other essential details of meetings-focused job roles

DURATION

Trainings will be
a total of 3 days

LOCATION

Trainings will be held
On-site at client's offices

PREREQUISITES

A solid understanding of basic Simpleview CRM concepts and functionality, which will be covered in a required virtual session from one of our Product Education Specialists.

MODULES & TOPICS

ACCOUNT DEVELOPMENT

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

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
- Handling Orders
- Creating/Editing/Deleting Contact Types
- Linking Meeting Sales Contacts to Related Records in Other User Groups
- Navigating Traces on the Account, Contact, Lead, Profile 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 AN ACCOUNT AND LEAD

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

CREATING, VIEWING AND UPDATING PROFILES

- Navigating Contacts
- Using Contact Filters
- Modifying the Grid Settings
- Adding a New Profile
- Merging Profiles
- Creating and Using Profile Tags

CREATING LEADS FOR ACCOUNTS

- Navigating Leads
- Using Leads Filters
- Modifying the Grid Settings
- Adding a New Lead
- Associating Account and Planner Information to a Lead
- Adding properties via Facility Search
- Handling Room Block Details on a Lead
- Creating and Using Lead Tags
- Creating/Editing/Deleting Lead Statuses and Types
- Providing Details for Lost Leads
- Scheduling Registrars
- Sending the Lead
- Closing the Lead

REVIEWING THE LEAD DETAIL AND HANDLING RESPONSES

- Viewing Data on Properties that Received the Lead
- Viewing Room Summaries, Contract Rooms, Pickup Rooms and Room Blocks
- 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 Response Data as a .CSV File
- Creating a .PDF Summary of Responses
- Compiling Attachments from Responses as a .ZIP File
- Viewing Missing Response Logs

USING THE EVENT IMPACT CALCULATOR FOR A LEAD*

- Reviewing Existing Event Impact Calculations on a Lead
- Creating a New Event Impact Calculation
- Creating/Editing/Deleting EIC Reporting Tags
- Printing Existing Event Impact Calculation Summary Reports

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 IN KIND/EXPENSES TO YOUR ACCOUNTS AND LEADS

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

ADDING COMMITMENTS TO YOUR LEADS

- Adding a Commitment to a Lead
- Printing a Commitment Summary

ADDING SERVICE REQUESTS TO YOUR ACCOUNTS AND LEADS

- 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 MEETING SALES DATA INTO REPORTS | FUNDAMENTALS

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

PULLING MEETING SALES 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 MEETING SALES DATA

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

ADDING NOTES TO AN ACCOUNT

- Navigating Notes on the Account Detail
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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

USING MOBILE CRM TO REVIEW MEETING SALES DATA

- Reviewing Traces
- Reviewing Meeting Profiles
- Reviewing Details on a Lead
- Using the Mobile Navigation
- Bookmarking Content
- Account Management
- Sending Emails
- Reviewing Driving Directions

USING THE MINT INTEGRATION WITH YOUR MEETING SALES USER GROUP

- Linking Accounts, Contacts, Profiles to MINT
- Importing MINT Contacts
- Importing MINT Meeting Profiles
- Importing MINT Historical and Future Bookings
- Sending Bookings to MINT
- Converting Bookings to History
- Using the MINT Booking Report
- Using the Post Convention/Booking Report (Convert History)

USING THE FAM/SITE INSPECTION GROUP FOR MEETING SALES

- Adding and Editing Flight Information for Attendees
- Adding an Itinerary to a FAM or Site Inspection
- Adding Activities to a FAM and Updating Activity Times
- Printing, Emailing and Importing Event Itineraries
- Tracking Partner Contributions in the Benefits Summary
- Tying a FAM and/or Site Inspection Event to a Lead in the Meeting Sales User Group
- Pulling Attendees into Invite Lists
- Inviting Attendees via Email
- Manually Entering/Tracking Responses
- Tracking Inkind/Expenses

* 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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