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.
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

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

MODULES & TOPICS CONTINUED
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

 llevando datos de ventas de reuniones en informes | FUNDAMENTOS
- Visualización de informes
- Uso de filtros de informes
- Modificación de los ajustes de la grilla
- Uso de informes estándar para obtener información
- Creación de informes simples

PULLING MEETING SALES DATA INTO REPORTS | ADVANCED TECHNIQUES*
- Creación de informes resumidos
- Creación de informes resumidos detallados
- Creación de informes de tablas cruzadas
- Programación de informes
- Compartir e instalar informes

PULLING MEMBER/PARTNER DATA INTO REPORTS | ADVANCED TECHNIQUES*
- Creación de informes resumidos
- Creación de informes resumidos detallados
- Creación de informes de tablas cruzadas
- Programación de informes
- Compartir e instalar informes

USING SEARCH TO FIND MEETING SALES DATA
- Navegar en búsquedas guardadas
- Uso de filtros de búsquedas
- Desarrollar una nueva búsqueda
- Realizar una búsqueda global

ADDITIONAL COMMUNICATIONS TO AN ACCOUNT
- Revisión de comunicaciones para una cuenta en la página de la cuenta
- Uso de filtros de comunicaciones
- Envío de una comunicación
- Desarrollo de plantillas para comunicaciones
- Uso del log de báilos de correo electrónico

ADDITIONAL NOTES TO AN ACCOUNT
- Navegar en notas en la página de la cuenta
- Agregar una nueva nota
- Agregar/actualizar categorías de notas
- Búsqueda de notas
- Impresión de notas

PULLING MEMBER/PARTNER DATA INTO REPORTS | FUNDAMENTALS
- Visualización de informes
- Uso de filtros de informes
- Modificación de los ajustes de la grilla
- Uso de informes estándar para obtener información
- Creación de informes simples

USING SEARCH TO FIND MEMBER/PARTNER DATA
- Navegar en búsquedas guardadas
- Uso de filtros de búsquedas
- Desarrollar una nueva búsqueda
- Realizar una búsqueda global
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 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
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