CRM DATABASE: ACCESS DEVELOPER MASTERCLASS

'GROW YOUR COMPANY WITH A CRM DATABASE'

Duration: 10 Days
Course Price: £4950
Course Code: ITM07

Course Requirements:

PCS strongly recommend that the delegate needs to have attended all 4 stages of the Access courses at Pringle PCS or at least have the high standard working knowledge.

Who Should Attend The Training?

This course is suitable for developers who want to gain the knowledge and confidence needed to help grow your business by creating their own custom CRM Database with our support.

Benefits From Attending The Training:

This course will give you all the Skills, Tools and Documentation to create and support a company Customer Relationship Management Database.

Upon completion of this course you will be leaving with a created CRM Database that will already be configured to your company requirements. With the skills learnt and knowledge gained you will have the confidence that'll allow you to support and improve the database, saving your company time and money and at the same time allowing your company to grow. This CRM Database will improve your companies marketing, sales, and service engagement whilst also improving your customer experience.

Course Contents:

Customer Relationship Management (CRM) Features

- Store key contact details about individuals and organisations.
- Associate multiple groups and sectors to a single Client.
- Flag companies by a particular type.
- Associate multiple addresses for one Client.
- Categorise your contacts into your own Region and Groups.
- Assign internal staff or teams to individual Client accounts.
- Store alternative names that are associated with a single Client.

Contact History

- Obtain instant access to a complete view of all contacts made with a single Client, by yourselves and your entire team.
- Create remainders and follow ups for you and your team to complete.
- Track performance of contacts made by your staff.
- Filter for Clients that have not been contacted within a given period.
- Quick input interfaces to log calls and auto generate set responses.
- Power E-Mailing tools.
- Group contact notes and responses to individual projects.
- Review full history notes made with an individual or switch to view the entire contacts made within their Company.
- Assign a single contact note to multiple Clients.

Contract Management

- Simple and straightforward, automatic notifications of when contracts are to expire or when regular schedule maintenance is needed to be planned.
- Split Contracts down into a number of Separate elements.
- Associate multiple Types to a single Contract.
- Log Tenders Submitted.

Future Leads

- View the combined status of all your pending sales by individual, team or company.
- Review target dates and potential revenue of your entire operations.
- Link documents and other sources of information for future work that your whole team can review at any given time.
- Track all correspondence relating to a particular lead.

Sale Campaigns

- Identify a selected group of Clients to target sales initiatives.
- Assign multiple Clients to a single Sales Campaign and review its success.
- When assigning Clients, the system offers flexible filter options: Company, Type, Groups, Sectors, Contact Types, Job Titles, Area, Last Time Contacted, Last Time Invoiced, and Account Managers.
- Assign budgets, track sales and expenditure.

Dashboards

- Access multiple sections of the database at once.
- Individual users can customise their own dashboards.
- Create up to 8 different dashboard templates for each system user.
- Dashboards are live and consistently update whilst being viewed.
- New dashboards are continually added during the year.
- Tailored dashboard service available (Create your own).

***BESPOKE COURSE | Course Duration, Level & Duration: Depends On Content & Individuals**