Contents

IRIS CRM - Initial Training Services

Aims of Initial Training

The aim of the initial training services included with your order are as follows:

Phase One

1. To confirm the connection of IRIS and IRIS CRM and demonstrate the synchronised client details
2. To reconfirm business objectives for CRM
3. To provide system orientation to one or two key users and enable them to understand the data synchronisation. Collectively, key users should be familiar with client data and understand the business objectives of the practice.

Phase Two

4. To provide introductory training to selected users of IRIS CRM
5. To confirm the first phase of IRIS CRM use is complete and
    a. Introduce business as usual support for the product and;
    b. Evaluate business objectives for CRM that are complete and those still to achieve
    c. Evaluate any further training needs

Customers will be expected to complete a simple sign-off that each phase is complete, without which the next phase cannot commence.

Activities included in Initial Training

Each phase of the initial training will be achieved as follows:

Phase One

1. Customers will receive connection details for their CRM system by email
2. Our project team will arrange and conduct a remote session (phone call and/or interactive meeting in join.me or similar software) with the customer's key user or users of IRIS CRM (typically IRIS CRM administrator and/or IRIS CRM champion AND Business Sponsor e.g. partner) to cover the following:
    a. Demonstrate and or observe/confirm the customer can connect to their IRIS CRM platform
    b. Orientate the key user(s) on the basics of IRIS CRM (Logon, user admin, client view etc.)
    c. Demonstrate and/or observe/confirm data synchronisation (i.e. does the customer recognise their clients and client details have been synchronised from IRIS?)
    d. Answer basic questions on the system and data
    e. Discuss business objectives and training agenda
3. Should there be any unresolved queries, these will be noted and progressed with the implementation team. Answers will provided and agreed with the customer as appropriate after the session.
4. Training Agenda and date to be (re)confirmed (a date may well have been *soft-booked* before this time) with the customer.

Phase Two:

1. IRIS CRM Overview Training will be conducted as per the training agenda agreed with the customer.
    a. This comprises one day (9:30am to 4:30pm with 1 hour lunch break) training for up to 8 staff at the customer's office (or other venue arranged by the customer). If there are more staff to train, then we recommend a train-the trainer approach (your key/champion staff will roll out end-user training to remaining staff). Alternatively, we can book additional chargeable training days to conduct further end user training to remaining staff.
    b. This day is aimed at all end users of IRIS CRM, however one module is more aimed at super users or administrators.
    c. The agenda for the training day will be tailored to focus on your specific short term business objectives which you hope to achieve with the help of IRIS CRM. The topics available are as follows (not all may be applicable nor can all be covered on the day onsite):
        i. Introduction & Overview
        ii. Reporting
        iii. List Management
        iv. Workflow & Communications
        v. Marketing Automation
        vi. Upsell/Pipeline Management
        vii. Workflow Management
        viii. User Dashboards
        ix. Administration
    d. An example agenda is shown below in Appendix 1: Example Onsite Training Day Agenda
2. The customer will then be provided with unlimited access to eight online training modules to consume at their own pace across any number of staff. These modules recap and build on topics introduced in the onsite training as well as introducing more advanced usage of IRIS CRM. They serve as rich "How-To" and self-paced training guide for all users of IRIS CRM. The current list of modules is shown in Appendix 2: Online Training Modules
3. Our project team will provide answers to queries for a short time after the initial training before introducing you to our standard support service.
4. Our project team will arrange and conduct a project closing call to:
    a. Confirm the user has access to the online training modules and check progress
    b. Introduce business as usual support for the product and;
    c. Evaluate business objectives for CRM agreed in phase one, including those that are complete and those still to achieve
    d. Evaluate any further training needs

Appendix 1: Example Onsite Training Day Agenda

Session 1 – Introduction and Overview

- Logging In to IRIS CRM & Updating Your Profile
- Understanding the modules of IRIS CRM & their use
- Basic & Advanced Searches
- Creating & updating information

Session 2 – Reporting

- Introduction to Reporting in IRIS CRM
- Review Standard Reports
- Creating a simple report & exporting the result

Session 3 – List Management

- Introduction to Lists in IRIS CRM
- Review Standard Target Lists
- Creating your own Target Lists

Session 4 – Workflow & Communications

- Introduction to Workflows in IRIS CRM
- Review Standard Workflows
- Review Standard PDF & Email Templates
- Modifying or creating your own Workflows & Templates

Session 5 – User Dashboards

- Introduction to Dashboards in IRIS CRM
- Review Standard Users Dashboard
- Customising 'Dashboards', 'Filters' & 'Dashlets'

Session 6 – Administration

- Introduction to Administration of IRIS CRM
- Creating New Users & Password Management
- Managing Security, User Roles and Teams
- Adding/Changing Dropdown Lists

Appendix 2: Online Training Modules

Module 1 – Introduction and Overview

- Logging In & Updating Your Profile
- Understanding the modules & their use
- Basic & Advanced Searches
- Creating & updating information
- Setting up a connection to your email

Module 2 – Reporting

- Review out of the box Reports
- Creating a simple report & exporting the result
- Creating a report with visualisations
- Creating user-settable filters to limit output

Module 3 – List Management

- Review out of the box Target Lists
- Creating a 'static' list based on a segment
- Using a report to build 'dynamic' lists
- Using a list to filter or target a segment of data

Module 4 – Marketing Automation

- Linking to & Working with an Email Marketing Platform
- Executing an Email Marketing Campaign
    - Template building (what to send)
    - Target List linking (who to send to)
    - Scheduling (when to send)
    - Analytics (Who opened, clicked, etc.)
- Event Management
- Creating Web forms for your website

Module 5 – Upsell/Pipeline Management

- Tracking of Sales Opportunities & Won Business
- Upselling/Cross Selling Services
- Lead nurturing & conversion
- Introducer/Referrer Management

Module 6 – Workflow Management

- Understanding Workflows
- Review out of the box Workflows
- What conditions Trigger a Workflow
- Triggering Actions including email alerts & task creation

Module 7 – User Dashboards

- Managing your home page
- Adding & Removing 'Dashlets'
- Setting up Dashlet Filters
- Creating multiple 'Dashboards'

Module 8 – Administration

- Creating New Users & Password Management
- Managing Security, User Roles and Teams
- Adding/Changing Dropdown Lists