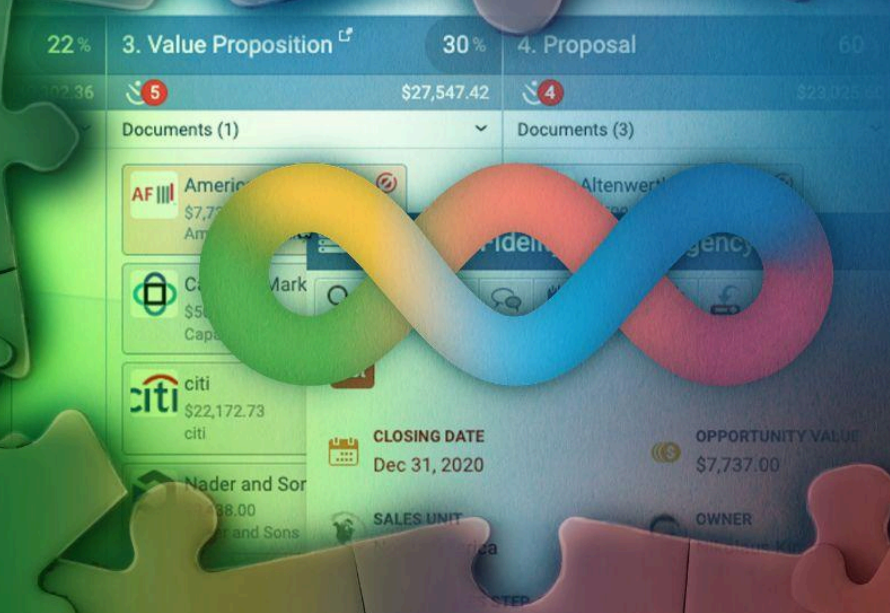




Pipeliner CRM

CUSTOMER ENGAGEMENT



Service Packages • 02

SCOPE OF WORK

Overview

The “**Customer Engagement**” package implementation usually will begin after the *Core Implementation* around the time of “**Go Live**” with Pipeliner (or can be purchased as a stand alone “module” at any time if additional advice or training on emails and templates is needed). Your users can then become familiar with the day-to-day use of Pipeliner and enter/edit initial data before starting to use some of the more advanced communication tools that Pipeliner offers.

Our *Customer Engagement* package helps you to create the Email and Document/Spreadsheet Templates, how to work with Standard and Mass Emails and enables you to guide your users to add Signature files helping to professional, standardised and timely communications with your customers and prospects.



The *Customer Engagement* package is part of our “**Infinity Onboarding**” model which encourages a practice of regular review and optimisation of your Pipeliner CRM system to ensure that it continues to evolve and expand to meet the needs of your business.

Engagement Consultancy & Training

These workshops/training sessions are designed to give your *Pipeliner Admins/Customer Engagement* team the advice and training needed for them to be able to create email and document templates, signatures and to work with both standard and mass emails. Our aim is to equip your team with the skills they need to

ensure that Pipeliner is your core communication tool. A maximum of 2 workshops and 2 hours of training is included in this package.

The *Customer Engagement* package covers the following:

- ✓ Email Templates
- ✓ Standard Emails
- ✓ Mass Emails
- ✓ Document and Spreadsheet Templates

Pipeliner's Commitment to You

Our implementations team will work in collaboration with your *Pipeliner Admins* and *Customer Engagement* team using a “**side-by-side**” model. This approach fully includes the relevant team members in the specification, creation and modification of templates, forms and sequences.

Your responsibilities

In order for any project to be successful, we will rely on you to:

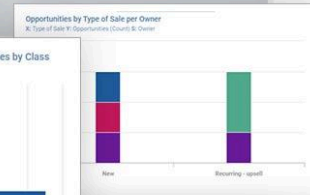
- Nominate the right colleagues to be included in your project team, ensuring that they have an appropriate level of knowledge to participate fully in the design process and that they are willing and able to provide written specifications in a timely manner
- **As part of the implementation, you'll need to be able to:**
 - Fully define your engagements requirements, audiences, responsible team members

What's Not Included in the *Customer Engagement* Package

The following are not included in the *Customer Engagement* package though, of course, are covered in detail in our other Professional Services Implementation packages. Having utilised our expertise in implementation and training, your own Admins will be able to evolve and update all of these features going forward:

- ✗ Configuration covered in our Core Implementation Package

- ✘ Data Import (*though some advice on data preparation will be offered*)
- ✘ Standard User of Admin Training (*a separate training package will be offered*)
- ✘ Configuration covered in our Core Implementation Package
- ✘ Data Import (*though some advice on data preparation will be offered*)
- ✘ Standard User & Admin Training (*a separate training package will be offered*)
- ✘ Approval Processes
- ✘ Automatizer Processes
- ✘ Reports and Dashboards
- ✘ Forecasts and Targets
- ✘ Online Forms
- ✘ Email Sequences
- ✘ Appointment Scheduler
- ✘ Calling & Messaging



Pipeliner CRM

Exceptional Engagement

The Better CRM > Built for Sales, Used by Sales!



The Pipeliner Universe – Sales Enablement, Knowledge, Networking

Pipeliner CRM
pipelinersales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global