



Pipeliner CRM

AUTOMATION (ADVANCED)



Service Packages • 04a

SCOPE OF WORK

Overview

The Pipeliner “**Automation**” (*Advanced*) package is an extension to the Automation package for customers wishing to enhance their use of our Automation tools by using Approval processes as well as Automatizer and Step Activities.

Nearly every organization has “**Yes, proceed/No, don’t go forward**” decisions that are made as part of business processes – proceed with this tender (*or not*); flag this new customer as a key account (*or not*), add this customer to the Christmas gifts list (*or not*) – and this is where our Approvals processes are invaluable for supporting those decision points.



The “**Automation**” (*Advanced*) 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.

Workflow Process Consultancy

This series of consultancy sessions/workshops is designed to help you identify which decision points can be managed more effectively by using Approval Processes and will teach your CRM Power Users how to define and create a maximum of 2 processes over a series of up to 3 workshop.

Documentation

Guidance pack including templates to help gather requirements will be sent out in advance of the first session.

Pipeliner's Commitment to You

Our implementations team will create your automations in collaboration with your Pipeliner *Admins/Automation* Leaders using a “**side-by-side**” model. This approach fully includes the relevant project team members in the specification, creation and modification of processes using our best practice guidelines and equipping them to continue to add future processes.

Your responsibilities

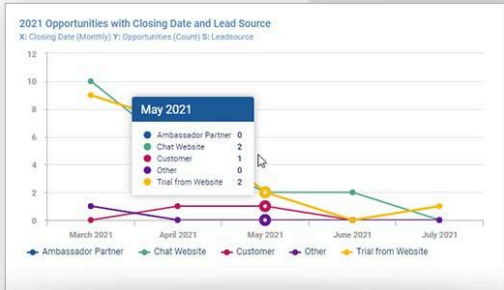
In order for any project to be successful, we will rely on you to:

- 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
- All nominated team members will need to have attended all Pipeliner Training sessions and will need a good understanding of how your users are working with the system on a day-to-day basis.
- **As part of the implementation, you'll need to be able to:**
 - Identify processes or sets of repetitive activities or user issues that could be solved using Approval processes
 - Provide the detailed descriptions of these key decision points as well as an overview of what you hope to achieve
 - Commit to the work required for testing and review

What's Not Included in this “Automation” (Advanced) package

The following are not included in the “**Automation**” implementation though, of course, are covered in detail in our other Implementation packages. Having utilised our expertise in implementation and training, your own Admins will be able to update these features going forward:

- ✘ Any item of configuration covered in our Core Implementation Package
- ✘ Data Import (*though some advice on data preparation will be offered*)
- ✘ Training (*a separate training package will be offered*)
- ✘ Automatizer processes and Sales Step Activities
- ✘ Reports and Dashboards
- ✘ Forecasts and Targets
- ✘ Email Sequences
- ✘ Appointment Scheduler pages
- ✘ Calling & Messaging
- ✘ Email Templates
- ✘ Document Templates



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