

Pronto-Xi Customer Relationship Management (CRM)

IN BRIEF

Delivery: Instructor Led

Duration: 1 day

Class size: 10 Students Max.

Cost: \$700.00 per person + GST

Inclusions: Certified instructor, comprehensive course manual, individual computer access and refreshments.

Prerequisites: Attendees should have completed a PRONTO Overview session and be familiar with the general functionality available within PRONTO. Attendees should also understand the concepts of Sales, Marketing, Customer Service, and Sales Management.

Products Covered:
Pronto-Xi

Course Description

Customer Relationship Management (CRM) is an organisational business strategy designed to optimise profitability; revenue and customer satisfaction by organizing the business around customer segments, fostering customer-satisfying behaviours and linking processes from prospects through to customers.

The attendees will be able to create ad hoc queries and reports based on data held on the system that they have security access to.

Audience

This course will benefit staff who have direct interaction with customer or clients. For example, Sales staff, Sales Managers, Customer Service personnel and Telemarketing operators.

Objectives

On completion of this course, attendees should be able to begin constructing pricing relationships according to their business needs.

Topics Covered

- Search
- Entering new prospects
- Contact details
- Site details
- Notes
- Record log
- Plan and manage activities
- Review account and order details
- Use of sales tools – Enter & maintain quotes, Enter Sales orders, Send info, List Processing
- Campaigns
- Reports

Other Workshops Available:

- Accounts Payable
- Accounts Receivable
- End of Year
- Fixed Assets
- General Ledger
- Inventory
- Local Purchasing
- ODBC
- Payroll
- Roles & Securities
- Sales Order Processing
- Spreadsheet Financial Reporting
- SQL
- Warehouse
and more....

