

Accelerator Product Training for CRM – Instructor Led Workshop Overview

Have you ever considered how you can get more out of your company's Autotask investment? Whether you are already using Autotask CRM in day to day sales, marketing and account management activities or are just considering how Autotask CRM can help you, this Autotask Accelerator Product Training (APT) for CRM workshop is for you. The goal of the APT for CRM workshop is to educate you on how to use Autotask CRM to automate and optimize key account management processes you need to execute every day to be successful.

After attending this live, instructor led workshop, you will be able to:

1. Configure your CRM for sales, marketing and account management activities.
2. Import products into your Autotask product catalog.
3. Generate and manage new and add-on opportunities and quotes in Autotask.
4. Understand your sales pipeline using reports and the CRM dashboard.
5. Utilize the Won Opportunity Wizard to communicate with stakeholders and launch new work.
6. Use the sales capabilities of the procurement module.
7. Create Contact Groups and templates to improve email communication with contacts.
8. Increase the return on your company's Autotask investment!

Why attend

- There is no cost to the workshop for members of the Autotask Community.
- This is live, instructor led workshop delivered in an intimate, classroom setting.
- It is a great opportunity to network with your peers, take a tour of the Autotask office and meet your account manager and support resources.
- Enjoy a complementary lunch and a post workshop happy hour with Autotask executives, managers and other Autotask resources.
- Walk away with PPT handouts, and step by step workbooks.

Prerequisites

- ✓ You need a login to your Autotask account so you can work in your Autotask system.
- ✓ If you have admin rights, or someone else from your company attends with has admin rights, you could update your Autotask system live during the workshop.
- ✓ A desire to learn more about CRM!

Agenda

- 9:00 am Registration, networking, office tour
- 10:00 am Accelerator product training for CRM
- 12:30 pm Complimentary lunch provided by Autotask
- 1:00 pm Accelerator product training for CRM
- 4:00 pm Wrap-up, end of workshop

Location

- The workshop is held at our U.S. HQ: 26 Tech Valley Drive, East Greenbush, NY 12061