

## «Bpm'online products» guided learning programme

**Target audience:** This guided learning course is intended for end-users who are just starting out with bpm'online. This course also may prove useful for bpm'online customers and partners looking for CRM products that will help them to improve their business efficiency, and formalize their company's business processes in terms of attracting new customers and organizing work with existing clientele.

**What to expect:** The participants will take part in a variety of learning courses / cases on all topics listed below.

**The participant must successfully complete the required e-learning courses before starting their guided learning.**

Time	Topic	Required e-learning courses
<b>Day 1. Bpm'online marketing guided learning</b>		
1,5 hours	<b>Landing</b> Creating a landing page which will be linked in a bulk email	<a href="#">MANAGING LEADS</a>
20 minutes	<b>Contact base segmentation, filtering and search capabilities</b> Selecting contacts used as a bulk email audience (depending on the case)	<a href="#">BPM'ONLINE INTERFACE OVERVIEW</a>

Time	Topic	Required e-learning courses
<b>Day 2. Bpm'online marketing guided learning</b>		
2 hours	<p><b>Managing bulk emails</b> Creating a bulk email. Populating bulk email audience. Manage bulk email parameters and adding UTM tags for tracking clicks and website visits.</p> <p><b>Content designer</b> Basics. Working with text blocks. Dynamic content. Working with blocks (buttons, images, etc.).</p> <p><b>Split tests</b></p> <p><b>Sending bulk emails</b> Sending bulk emails. Bulk email analysis.</p>	<a href="#">EMAIL MARKETING</a>

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Time	Topic	Required e-learning courses
<b>Day 3. Bpm'online sales guided learning</b>		
1 hour	<b>Product catalog</b> Currency settings Product list import	
20 minutes	<b>Managing leads</b> Lead life cycle	<a href="#">LEAD MANAGEMENT</a>
2 hours	<b>Managing long sales</b> Opportunity life cycle	<a href="#">SALES MANAGEMENT. OPPORTUNITY MANAGEMENT</a>
30 minutes	<b>Managing short sales</b> Setting up installment plans Creating invoices for all payment steps Creating a contract based on an order Short opportunity life cycle	<a href="#">MANAGING ORDERS AND INVOICES</a>

Time	Topic	Required e-learning courses
<b>Day 4. Bpm'online service guided learning</b>		
1 hour	<b>Services and service agreements</b> Calendar management Creating a service Creating a service agreement	<a href="#">ITSM IN BPM'ONLINE</a>
1 hour	<b>Каналы получения обращений</b> Email settings Portal settings Unique communication panel actions Landing	<a href="#">HOW TO PROCESS CASES</a>
40 minutes	<b>Case routing</b> Setting up queues Creating a blind queue Adding new objects Using various processes	<a href="#">CONTACT CENTER. QUEUES AND AGENT DESKTOP</a>
40 minutes	<b>Deadlines</b> Setting up case resolution deadlines	
20 minutes	<b>Case life cycle</b> Basic reference life cycle cases	
20 minutes	<b>Managing feedback</b> Setting up the feedback scale and question	<a href="#">MANAGING FEEDBACK</a>