

BPM'ONLINE PRODUCTS OVERVIEW CORPORATE TRAINING

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: : Participants will receive key knowledge on the capabilities of the bpm'online platform, and product features and functionality.

Course duration: The training takes place over 2 days with a total of 8 hours each session

Duration	Topic
Day 1. Platform overview and bpm'online marketing features	
15 minutes	Introduction to bpm'online products
30 minutes	System interface and terminology
45 minutes	360° customer view <ul style="list-style-type: none"> Managing information about customers/partners/competitors in the [Accounts] section Managing information about contacts and employees in the [Contacts] section
40 minutes	Database management <ul style="list-style-type: none"> Finding and merging duplicates Populating contact and account data with Facebook data Setting up and synchronizing contacts with Google contacts Synchronizing with Exchange contacts Exporting data from the system List customization
	Organizing and searching for data in the system <ul style="list-style-type: none"> Filter types: Quick, standard, advanced Creating folders and tags to segment the customer base Adding aggregated columns Navigating the system via the command line Customizing general and personal dashboards Drill-down in charts and saving data to a file
1 hour	Communication and daily task management <ul style="list-style-type: none"> Working with the calendar (visits, tasks) Synchronizing tasks and meetings with Google Calendar and MS Exchange Working with emails Integration with telephony Working with the notification center Enterprise Social Network (ESN) Setting up the feed
1 hour	Lunch
40 minutes	Managing leads <ul style="list-style-type: none"> Populating the base with leads Registering and entering lead data Entering need information Managing channels, and sources Managing lead stages and working by the built-in "Lead management" business process Analytics
40 minutes	Landing pages <ul style="list-style-type: none"> How to set up a landing page: overview and recommendations How to automatically register leads from your landing page Examples of landing pages on the bpm'online website

Duration	Topic
40 minutes	<p>Email marketing</p> <ul style="list-style-type: none"> • Integration with the bulk email service and licensing bpm'online marketing • Conducting one-time bulk emails • Adding a new bulk email and preparing a template in the new visual content designer • Populating the bulk email audience manually • Managing the bulk email parameters and adding UTM tags to track clicks • Bulk email results analysis • Trigger emails <p>Split testing Pre-configured bulk email analytics</p>
20 minutes	<p>Managing events</p> <ul style="list-style-type: none"> • Planning events, building a team and budget • Selecting a target audience • Organizing employees to prepare and conduct an event. Task log <p>Analytics</p>
40 minutes	<p>Managing marketing campaigns</p> <ul style="list-style-type: none"> • Modeling communication with the campaign audience in the campaign designer • Modeling outbound and inbound campaigns • Launching and tracking campaign progress <p>Analytics</p>
20 minutes	<p>Email marketing best practices</p> <ul style="list-style-type: none"> • Account reputation and the customer base relevance • Configuring emails to be sent on behalf of your company • How to avoid spam filters • Setting up an unsubscribe macro • Managing subscriptions for various bulk email types • Setting up a limit for the number of emails sent to recipients

Day 2. bpm'online sales and service features

15 minutes	<p>Managing leads</p>
35 minutes	<p>Managing a product catalog</p> <ul style="list-style-type: none"> • Categorizing products and using different measure units • Maintaining multiple price lists • Recording residues and reserving products in the warehouses • Single products selection window in orders and invoices • Configuring multilevel product catalog and faceted search for products by catalog
1 hour	<p>Sales management</p> <ul style="list-style-type: none"> • Setting up opportunity stages • Building a sales team and a list of customer contacts • Recording and tracking the history of changes of sales manager tactics, competitors and their products • Opportunity history (stages, activities, invoices, orders, documents) • Conducting an opportunity through the "Corporate sale" business process • Sales manager efficiency analysis • Planning and analysis
1 hour	<p>Managing orders and invoices</p> <ul style="list-style-type: none"> • Orders in companies with both long and short cycles • Building the supply and payment chart, using a collection of themes and customizing new graphics templates • Approving and signing order conditions via internal signing
20 minutes	<p>Managing contracts and documents</p> <ul style="list-style-type: none"> • A single list of contracts, additional agreements and specifications • Registering contracts in the system • Managing subordinate contracts: additional agreements and specifications Documents
30 minutes	<p>Managing field sales</p> <ul style="list-style-type: none"> • Visits planning • Setting up field sales rules • Working with bpm'online sales mobile application

Duration	Topic
20 minutes	Managing projects <ul style="list-style-type: none">• Section purpose• Structure and usage specifics• Timing, project resource management, monitoring execution
1 hour	Lunch
20 minutes	Managing the service catalog <ul style="list-style-type: none">• The catalog of services and their characteristics• Consolidated financial statements for services rendered
1 hour	Managing cases <ul style="list-style-type: none">• The organizational structure of the service center Detecting and registering cases <ul style="list-style-type: none">• Recording key case information• Automatic registration of requests via incoming email• Registering of cases by incoming calls Investigating and solving cases <ul style="list-style-type: none">• Case processing• Working with knowledge base Analytics
1 hour	Agent desktop <ul style="list-style-type: none">• Overview• Queue management - organization of cases work flow
40 minutes	The self-service portal <ul style="list-style-type: none">• Setting up the self-service portal main page• Creating self-service portal users• Self-service portal user access rights• How to register a case