Act! CRM Course Guide

Instructor-led Act! training onsite, off-site or online

- Experienced partner - training Act! users since 1993
- Personalised tuition to fit your requirement
- Act! training delivered at your premises, carried out from our office in Maidenhead or remotely
- Tuition carried out using your own database
- Schedule training for individuals or groups
- We provide training on all recent Act! versions
- Courses include: introductory tuition for new Act!, users, power user training, database administrator training, bespoke courses & Act! emarketing training

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act! DIAMOND BUSINESS PARTNER 2016

Introduction

If you are a new to Act!, or you want to develop your user skills, Preact have a course to match your requirements.

This guide features examples of courses that our team deliver and we've included a series of recommendations to help you get the most from your training.

Preact have trained Act! users since 1993 and a fully accredited Act! consultancy you can be sure of working with a leading partner.

Our courses are delivered on-site, or from our office in Maidenhead, as private sessions that are fully bespoke to your processes and training needs. Through tutor led examples we'll help you to quickly master learning points and build confidence with Act!

We are committed to ensuring that your Act! training aims are fully achieved. As part of our preparation the consultant who will deliver your training will phone several days in advance to confirm a course structure so we can accelerate the skills transfer.

With options for group and one-to-one tuition, job role specific courses and train the trainer sessions we're sure to have a training solution for you.

Call us on 0800 381 1000 to discuss your training requirements and schedule your course.

Ian Mennie

Technical Operations Director

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> ‘Excellent training! Very friendly & people focused! Helped us understand Act! really well and really quickly thanks to structured and creative tuition!’
>
> *Tevo Limited*

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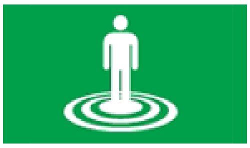
Introduction Training

Duration: 1 Day



Provides a solid foundation in the principles of using Act! and focusing on its core features and functionality for end users

Our recommended introduction course structure includes:

- **Introducing Act!**
  Essential Act! screen elements - Act! welcome screen - Database navigation best practices - Using Act! toolbars, menus & tabs
- **Contact Record Basics**
  Adding, editing & deleting Act! records - Data entry rules - Using notes & history tabs - Avoiding duplicated records - Controlling access to Act! records
- **Finding Act! Contacts & Data**
  Using the look-up menu - Keyword searches - Act! universal searches - Reverting to previous look-ups - Creating a basic contact query - Customising list views - Checking contact activity
- **Document Attachments**
  Attaching documents to Act! - Attaching short-cuts - Using the document preview pane - Linking to documents stored on Sharepoint, Dropbox & other cloud platforms
- **Act! Reports**
  Introducing Act! reports - Working with standard report templates
- **Opportunity Management**
  Creating Act! opportunities - Editing, closing & filtering opportunities - Creating sales reports - Working with opportunity dashboards
- **Activity & Calendar Management**
  Scheduling activities - Using the Act! task list & calendars - Customising calendar views - Using the Act! contact timeline view - Scheduling activities with multiple contacts - Synchronising activities with Outlook
- **Using Act! with Email**
  Using Act! to send and receive e-mails - Attaching e-mails to contacts - Creating Act! records & activities from incoming e-mails - Setting Outlook email preferences
- **Writing Documents & Mail Merges**
  Creating document templates using Act! fields - Sending Act! mail merges in Microsoft Word
- **Groups & Companies**
  Working with Groups & Companies - Toggling group & company views - Creating group & company member notes, histories, activities & opportunities - Setting Company preferences

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'Your Act! consultant worked hard to assess user needs and answer questions. Always attentive, knowledgeable and approachable. Very impressive.'

Cranfield University

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Bespoke Advanced User Training

We'll help you to create a customised course that perfectly targets your training needs. This type of tuition is popular with sales and marketing teams and can include the following topics:

For Sales Users

- **Customising the Act! Opportunity Module**
  Creating multiple sales processes - Managing Act! product lists - Creating & editing sales document templates - Customising the Act! opportunity layout - Adding new sales opportunity fields including calculated fields
- **Working with Sales Opportunities**
  Customising sales opportunity selling stages - Tracking activities & histories with opportunities & contacts - Attaching documents to sales opportunities
- **Sales Opportunity Management & Reporting**
  Working with Act! opportunity lists - Working with default Act! sales reports - Customising sales reports - Using the Act! sales dashboard & pipeline charts - Editing dashboard components & applying filters

For All Users

- **Working with Multiple Contacts**
  Creating notes & histories for multiple contacts - Attaching files to multiple contacts - Applying global changes to contacts
- **Advanced Activity Scheduling**
  Granting calendar access to other users - Customising activity types - Working with an activity series, - Defining activity priority levels - Assigning resources to activities– Applying Smart Tasks to trigger activities - Scheduling global events
- **Web Links & Social Media Updates Tabs**
  Working with the web links tab - Editing & adding dynamic links using Act! field data - Configuring Act! to work with LinkedIn and Facebook profiles
- **Company & Group Records**
  Managing company & group records - Creating divisions & sub-group records - Using static and dynamic membership rules - Applying changes to contact members

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'Thank you for two very productive Act! training days. It was satisfying to see a consultant so well prepared & ready to deliver what we were after.'

Balreed Digital

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Bespoke Advanced User Training

For Marketing Users

- **Profiling Act! Contacts**
  Tracking additional data to improve contact profiling - Act! field options & field rules - Adding and amending Act! fields
- **Contact Data Lists**
  Preparing lists before importing into Act! - How to import data lists & contacts into Act!
- **Building Contact Lists**
  Using advanced look-ups and complex Act! queries - Benefits of targeting contact groups vs. generic mailing lists - Managing Act! groups & sub-groups - Using dynamic groups to apply membership rules
- **Managing Mailing Lists**
  Checking for duplicates & de-duplicating data - Data cleansing checks & best practice processes
- **Email Marketing with Act!**
  Creating email templates - Editing & formatting email templates - Linking images & PDF files to Act! email templates - Deciding email subject titles - Testing & sending your email merge - Managing opt-out requests & email bounce-backs
- **Introducing Act! Emarketing**
  Advanced email marketing functionality including using HTML email templates & e-marketing reporting
- **Act! Smart Tasks**
  Automating Act! Emarketing campaigns using Act! Smart Tasks
- **MS Word Mail Merging from Act!**
  Editing & formatting templates for Act! mail merges - Converting MS Word documents to Act! templates - Mail merge best practice including testing, batching & dealing with long documents - Attaching a mail merge record history to multiple contacts - Making templates printer friendly - Printing labels & envelopes
- **Marketing Reporting**
  Tracking the marketing referral source on new sales opportunity - Using Act! reports to measure marketing results
- **Keeping in touch** - Assigning new sales opportunities to Act! users, scheduling follow up activities to stay on top of leads and enquiries, creating custom marketing activities to track leads & group scheduling.

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'I found your trainer to be a great teacher. She immediately made me feel at ease to ask questions and learn quickly. I would highly recommend Preact to anyone.'

Schwank Ltd

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Act! Emarketing Training

Duration: 1 Day

act! emarketing

This session focuses on how you can use Act! Emarketing to generate marketing leads. We'll focus on its integration with Act! for planning, sending and analysing e-marketing campaigns.

- **Introduction to Act! Emarketing**
  The basics of using Act! Emarketing - Email law & avoiding spamming - Integration with Act!
- **Email Template Library**
  Customising emarketing templates - Personalising templates with Act! data - Uploading images - Publishing templates - Importing HTML templates
- **Act! Emarketing Content Editor**
  Editing email template text - Image options including sizing and positioning - Uploading & linking to PDF documents
- **Customizing Email Templates**
  Set Column Widths - Formatting email template windows
- **Surveys**
  Creating a New Survey - Adding & amending survey questions - Linking surveys to image or text - Testing surveys - Survey responses
- **Importing your Act! Contact List**
  Setting up your Act! contact group - Uploading your contact list to Swiftpage
- **Sending Act! Emarketing Emails**
  Changing sender name &/or email address - Scheduling emails
- **Email Campaign Reports**
  Access your campaign reports - Open & click summary reports - Campaign detail reports - Account reports
- **Call Lists**
  Creating Emarketing Call Lists - Assigning lists - Emarketing results tab
- **Integrating Act! Emarketing with Smart Tasks**
  Creating Smart Tasks to Automate Emarketing Messages - Developing Triggered Email Campaigns
- **Emarketing Tips & Advice**

Book your Act! Training: 0800 381 1000 or +44(0)1628 661810

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Database Administrator Training

Duration: 1 Day

> 'We had a great training session. Sue answered all questions we threw at her - & there were quite a lot! We all agreed that the session was well worth the money!'
>
> *Chartridge Conference Company*

Tuition enabling administrators to manage, maintain and customise their Act! database

Our recommended introduction course structure includes:

- **Creating an Act! Database**
  How to create a new Act! database - Adding new Act! user accounts - Setting browse-Only user access - Deleting Act! users & re-assigning user data - Understanding Act! security roles - Setting currency preferences - Managing Act! teams - Setting database preferences

- **Managing Act! data**
  Finding & removing duplicate records - Backing up an Act! database, Restoring Act! data - Locking / unlocking a database - Clearing old contact data - Applying automated Act! database scheduler alerts - Best practices for database performance and data integrity - Using smart tasks to apply user permissions

- **Importing & Exporting Data**
  Using the Act! import wizard - Importing data from other applications - Creating a data import map - Exporting Act! data & contact lists

- **Database Customisation**
  Configuring Act! field options including tick boxes, calculated fields & drop-down lists - Defining fields & customising Act! layouts - Customising Act! menus & toolbars – Applying rules for automatic company record creation

- **Admin Dashboards**
  Configuring Act! administration dashboards

- **Act! Network Configuration**
  Understanding how Act! works on a network - Integrating Act! with other applications including MS Outlook & MS Word & locating program files and folders

- **Sharing Act! data with remote users**
  Introducing Act! database synchronisation - Sync options & performing data sync - How to deploy and manage Act! Premium for Web and Act! Premium Mobile

- **Act! Report Templates**
  Act! report customisation & an overview of advanced reporting capability using VB scripting

Act! Training Recommendations

Just like any application, success with Act! is dependant on how well people use the software.

To help you maximise the value of your training we've listed some recommendations to start your preparation.

Define your success criteria & set expectations

Before the session confirm your training aims and share them with your team to gain shared commitment to achieving them.

Consider incentives that'll increase the motivation of your team to put these learning points into action, e.g. base rewards on Act! metrics.

Confirm the skill gap

For new implementations most people will be at the same skill level but if your business has been working with Act! for a while we recommend identifying each individual's priorities and assessing the skill gap.

If you have a mix of competency levels consider splitting training into separate modules. This could involve different groups in morning and afternoon sessions, or tuition spread over several days.

For individuals with very specific Act! requirements one-to-one tuition may prove the best option.

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Training Environment

Act! tuition will never be effective if users are distracted by emails, phone calls and office chatter.

It sounds obvious but many still attempt to arrange training at their workspace and are disappointed with the results. For a more conducive training environment try to book a room away competing distractions.

Check the IT

If you're using a meeting room for training or scheduling the course at a different site, check to make sure everyone will have access to all the necessary IT resources.

Allowing delegates to follow tutor led examples on their own computer will always be more effective than watching a presentation screen or sharing laptops.

Each person attending should have access to your Act! database so they can test and apply all the learning points covered.

Limit Group Sizes

We recommend each training group should not exceed 5-6 people. With larger groups there is high risk that user questions and chat will slow pace of the day restricting the depth of content that can be covered.

Confirm Management Support for CRM

Some users may use training as a forum to push back on anything that impacts on their role and build resistance against change.

Pre-empt this by having the session opened by a senior manager or director to reinforce executive commitment to your contact management database strategy.

Training Takeaways

Create a tips sheet, send an email or even pin up step-by-step instructions so learning points have lasting visibility beyond the training session.

Preact can help you prepare follow up training material to ensure key learning points are reinforced after the day.

Act! Training Review

Maintain the momentum that will be created following your training by reviewing progress.

Immediately after your training schedule a meeting a few weeks later to get users together to share experiences, review progress, suggest new ideas and if necessary take corrective action.