

## CREATIO PRODUCTS OVERVIEW CORPORATE TRAINING

**Who should take this course:** This course is intended for end-users who are just starting out with Creatio. This course also may prove useful for Creatio 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 Creatio platform, product features and functionality.

**Course duration & format:** The training takes place over 2 days with a total of 8 hours each session. In-person or online.

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

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

**DAY 2. SALES CREATIO AND SERVICE CREATIO FEATURES**

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

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