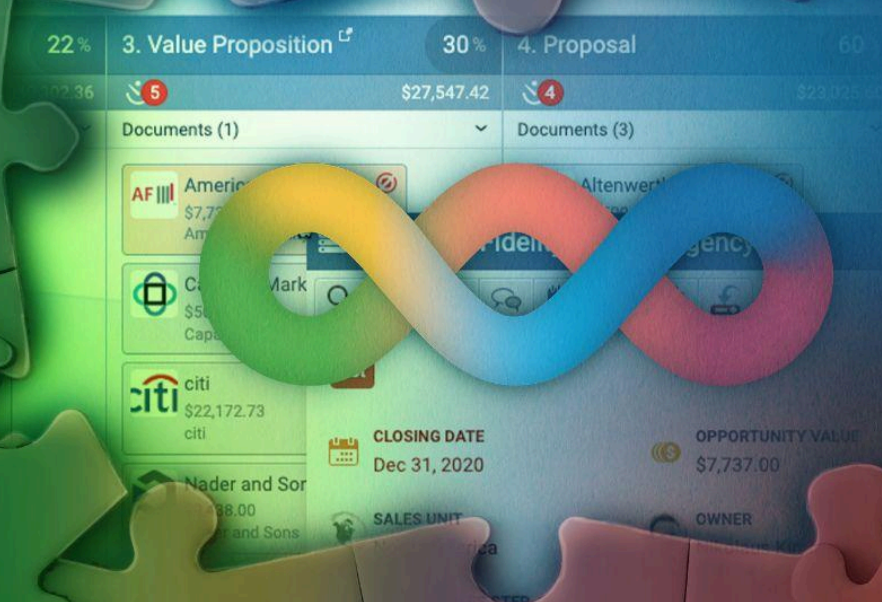




Pipeliner CRM CUSTOMER ENGAGEMENT (ADVANCED)



Service Packages • 02a

SCOPE OF WORK

Overview

The “**Customer Engagement**” (*Advanced*) package implementation usually will begin straight after the *Customer Engagement* package has been delivered, a week or 2 after Go Live with Pipeliner (or can be purchased as a stand alone “module” at any time if additional advice or training on emails and templates is needed). Your users will be familiar with using Pipeliner for creating and tracking emails and you can start to use some of the more advanced communication tools that Pipeliner offers.

Our *Customer Engagement (Advanced)* package helps you to use the templates and skills learnt in the *Customer Engagement* package and to extend the level of sophistication used for engaging with customers to include Online Forms, Appointment Scheduler pages and Email Sequences.



The *Customer Engagement (Advanced)* package is part of our “**Infinity Onboarding**” model which encourages a practice of regular review and optimisation of your Pipeliner CRM system to ensure that it continues to evolve and expand to meet the needs of your business

Note that it is very common for Email Templates, Email Sequences and Online Forms to be components used in automated processes which are covered in our Automation Package.

Engagement Consultancy & Training

These workshops/training sessions are designed to give your *Pipeliner Admins/ Customer Engagement* team the advice and training needed for them to be able to create Email Sequences, work with Appointment Scheduler pages and includes links to pages in Emails and to create and publish Online Forms for different business scenarios such as updating and cleaning customer data, event registration and lead creation. A maximum of 3 workshops and 3 hours of training is included in this package.

The *Customer Engagement* package covers the following:

- ✓ Email Sequences
- ✓ Online Forms
- ✓ Appointment Scheduler pages

Pipeliner's Commitment to You

Our implementations team will work in collaboration with your *Pipeliner Admins* and *Customer Engagement* team using a “**side-by-side**” model. This approach fully includes the relevant team members in the specification, creation and modification of sequences, forms and scheduler pages.

Your responsibilities

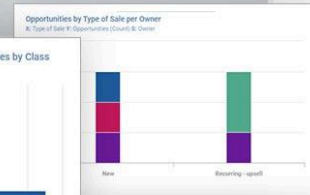
In order for any project to be successful, we will rely on you to:

- Nominate the right colleagues to be included in your project team, ensuring that they have an appropriate level of knowledge to participate fully in the design process and that they are willing and able to provide written specifications in a timely manner
- **As part of the initial build, you'll need to be able to:**
 - Fully define your engagements requirements, audiences, responsible team members

What's Not Included in the *Customer Engagement (Advanced) Package*

The following are not included in the *Customer Engagement (Advanced)* package though, of course, are covered in detail in our other Professional Services Implementation packages. Having utilised our expertise in implementation and training, your own Admins will be able to evolve and update these features going forward:

- ✗ Configuration covered in our Core Implementation Package
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Standard User of Admin Training (*a separate training package will be offered*)
- ✗ Configuration covered in our Core Implementation Package
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Standard User & Admin Training (*a separate training package will be offered*)
- ✗ Calling & Messaging
- ✗ Email Templates
- ✗ Document Templates
- ✗ Approval Processes
- ✗ Automatizer Processes
- ✗ Reports and Dashboards
- ✗ Forecasts and Targets



Pipeliner CRM

Exceptional Engagement

The Better CRM > Built for Sales, Used by Sales!



The Pipeliner Universe – Sales Enablement, Knowledge, Networking

Pipeliner CRM
pipelinersales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global