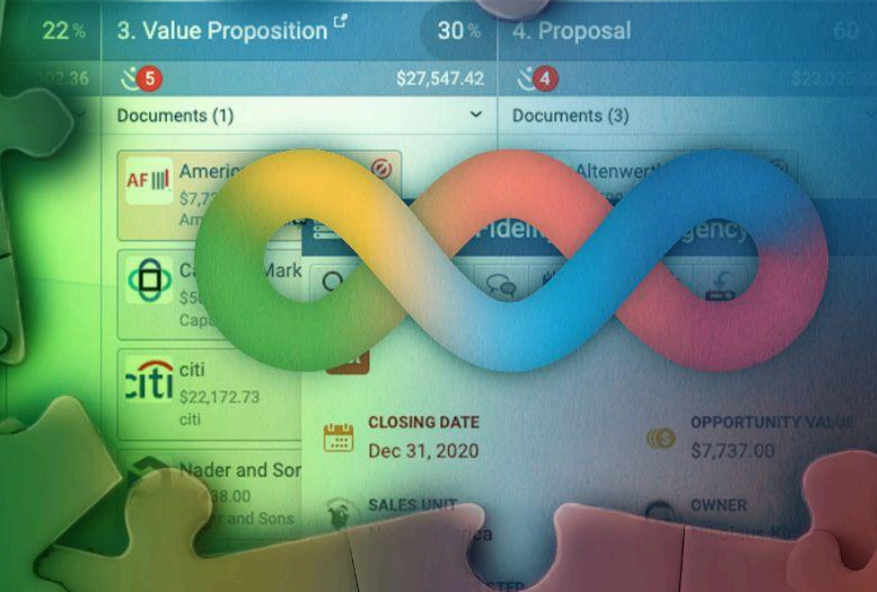




Pipeliner CRM ANALYTICS



Service Packages • 03

SCOPE OF WORK

Overview

The “**Analytics**” package implementation usually will begin approximately 2/3 weeks post Go Live with Pipeliner (or can be purchased as a stand-alone “module” at any time if additional advice or training on reports is needed). This approach allows your users to become familiar with the day-to-day use of Pipeliner and to enter/edit initial data before your Leaders begin to report on the data and activities being captured in Pipeliner.

Our *Analytics* package helps you to create the *Reports, Dashboards, Forecasts* and *Targets* that you need to use to give you the strategic intelligence needed to run your organisation.



The *Analytics* 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.

Analytics Consultancy & Training

These workshops/training sessions are designed to gather your fundamental requirements for reporting in Pipeliner, to help you create a set of initial reports and to teach your leadership team how to use (or even create their own versions) of these core reports. Our aim is to equip your teams with the skills they need to ensure that Pipeliner

works as the core business intelligence reporting tool that it is designed to be. A maximum of 2 workshops and 3 hours of training is included in this package.

The *Analytics* package covers the following:

- ✓ Reports (*Standard and Pivot tables*)
- ✓ Charts
- ✓ Dashboards
- ✓ Forecasts
- ✓ Targets
- ✓ Insights

Pipeliner's Commitment to You

Our implementations team will work in collaboration with your Pipeliner Admins and Leaders using a “**side-by-side**” model. This approach fully includes the relevant team members in the specification, creation and modification of reports, dashboards, forecasts and targets equipping them with the skills they need to use these tools to manage your business.

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 process and that they are willing and able to provide written specifications in a timely manner
- **The team will need to be able to:**
 - Fully define your reporting requirements, audiences, responsible team members

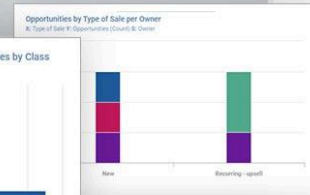
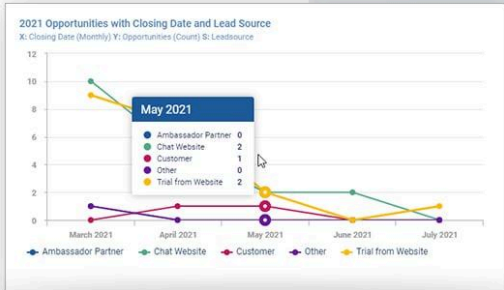
What's Not Included in the *Analytics* Package

The following are not included in the *Analytics* 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 all of these features going forward:

- ✗ Configuration covered in our Core Implementation Package
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Standard User or Admin Training (*a separate training package will be offered*)
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Training (*a separate training package will be offered*)
- ✗ Email Sequences
- ✗ Appointment Scheduler pages
- ✗ Calling & Messaging
- ✗ Email Templates
- ✗ Document Templates
- ✗ Approval Processes
- ✗ Automater Processes





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