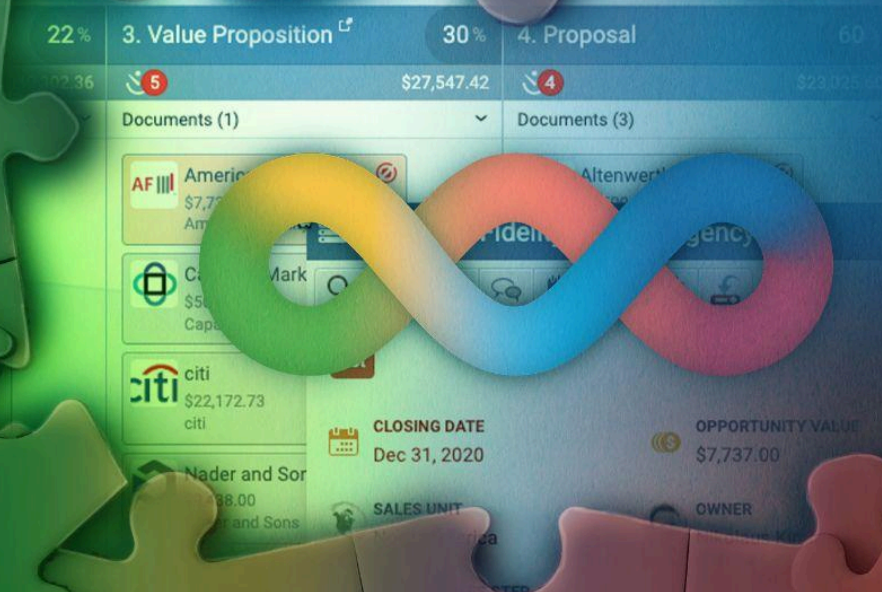




# Pipeliner CRM AUTOMATION



Service Packages • 04

SCOPE OF WORK

## Overview

The Pipeliner “**Automation**” package is designed to follow the *Core Implementation*, or could be used as a stand-alone “**module**” to enhance the use of Pipeliner within your business if you’ve recently added *Automatizer/Approvals* to your subscription.

The aim is to give each organisation time to get familiar with how Pipeliner works on a day-to-day basis for users; to clearly identify where there are repetitive tasks which can be automated to free up time for more human interactions with your customers and where standardisation of processes will improve efficiency for all of your teams.



The *Automation* 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.

## Workflow Process Consultancy

This series of consultancy sessions/workshops is designed to help you identify which processes/repetitive tasks can be effectively automated and the best way to achieve that automation by using *Automatizer*, *Approval Processes* and/or *Sales Checklist Activities*. **A maximum of 5 sessions is included in this package.**

### Automatizer Consultancy/Implementation

These workshops will firm up the specification of processes to be implemented using our Automatizer workflow engine. Up to 5 of these processes will then be implemented.

### Approval Process Consultancy/Implementation

We'll work with you to identify and implement business requirements which can be most efficiently achieved using Approval Processes. Two Approvals processes are included.

### Sales Checklist Activities Review/Implementation

If you added Sales Checklist Activities as part of your *Core Implementation*, this is the perfect time to do a first review of how well they are working in practice and to add/edit or remove in order to streamline working with Opportunities in any of your Lead or Opportunity processes.

#### **Documentation:**

Guidance pack including templates to help gather requirements will be sent out in advance of the first session.

## Pipeliners' Commitment to You

Our implementations team will create your automations in collaboration with your Pipeliner *Admins/Automation* Leaders using a “**side-by-side**” model. This approach fully includes the relevant project team members in the specification, creation and modification of processes using our best practice guidelines and equipping them to continue to add future processes.

## Your responsibilities

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

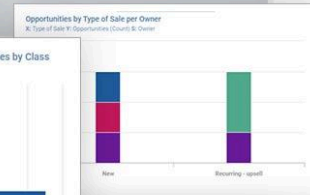
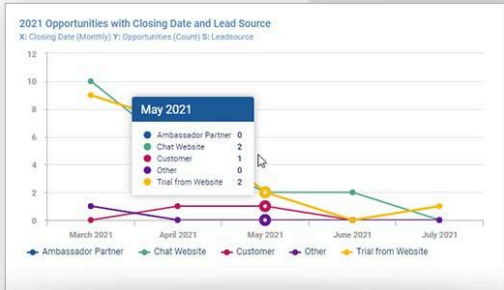
- Nominate the right colleagues to be included in your project team, ensuring that they have an appropriate level of knowledge to participate fully in the design process and that they are willing and able to provide written specifications in a timely manner

- All nominated team members will need to have attended all Pipeliner Training sessions and will need a good understanding of how your users are working with the system on a day-to-day basis.
- **As part of the implementation, you'll need to be able to:**
  - Identify processes or sets of repetitive activities or user issues that could be solved using some degree of automation
  - Provide the detailed descriptions of these business areas as well as an overview of what you hope to achieve
  - Commit to the work required for testing and review

## What's Not Included in this Automation implementation

The following are not included in the *Automation* implementation though, of course, are covered in detail in our other Implementation packages. Having utilised our expertise in implementation and training, your own Admins will be able to update these features going forward:

- ✗ Any item of configuration covered in our Core Implementation Package
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Training (*a separate training package will be offered*)
- ✗ Working with Custom Entities
- ✗ Reports and Dashboards
- ✗ Forecasts and Targets
- ✗ Email Sequences
- ✗ Appointment Scheduler pages
- ✗ Calling & Messaging
- ✗ Email Templates
- ✗ Document Templates



# Pipeliner CRM

**Exceptional Engagement**

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



The Pipeliner Universe – Sales Enablement, Knowledge, Networking

Pipeliner CRM  
[pipelinersales.com](http://pipelinersales.com)

Sales POP!  
[salespop.net](http://salespop.net)

Go Ahead!  
[go-ahead.global](http://go-ahead.global)