



## **SALES TRACK® & MARKET MENTOR® - Day 3**

### **Customer Relationship Marketing & Sales Campaign Management**

9:00am – 5:00pm - \$295

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- 1. WELCOME, INTRODUCTIONS, REVIEW OF OBJECTIVES** (15 min)
  - 2. INTRODUCTION TO CUSTOMER RELATIONSHIP MANAGEMENT** - PowerPoint - (30 min)
    - A. Common Sales and Marketing Challenges
    - B. Elements of a Successful Relationship Marketing and Customer Care Program
      1. Developing new business by building relationships that last
      2. Showing appreciation to new customers
      3. Maintaining consistent contact and building relationships with customers
  - 3. SALES TRACK** (90 min)
    - A. Overview & Installation
    - B. Setup: User File, CIF File, Document File, and Master Tracks
    - C. Daily Operation: Assigning contacts to tracks, Running Daily Processes, Reporting, Management
  - 4. AUTOMATION SERVER OVERVIEW & SETUP** (45 min)  
**LUNCH** (60 min)
  - 5. CLASS EXERCISE**
    - A. Install Sales Track (use Installation Worksheet)
    - B. Set up Sales Track (User File, CIF File, Document File and Master Track)
    - C. Design a Trade Show Follow up Sales Track (use Master Track Worksheet)
  - 6. MARKET MENTOR “Quick Start” CRM PROGRAM**
    - A. Overview & Explanation of the Pre-designed Sales Track Tracks
      1. Prospecting/Introduction Track
      2. Interested Tracks: a) With Appointment, b) Without Appointment
      3. Not Interested Now Track
      4. Not Interested Track
      5. Lost Sale Track
      6. Trade Show Follow up Track
      7. New Customer Celebration Track
      8. Long-Term Customer Care Track

## **7. WRAP UP AND Q&A**

### **NOTE:**

1. Participants must be trained and proficient in the use of Windows 98/2000 and MS-Word 97/2000, TeleMagic’s Contact Manager and Activity Manager, email and how they integrate with MS-Word.
2. Modules of 60 minutes or less are considered basic use/overview and not in-depth training.