CRM Training for Sales Managers

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If you are a Sales Manager this video will take you through the administrative functions of the HyperDrive Pro CRM. You will learn how to:

- Create a flag in the CRM
- Use birthday assistant to stay in touch with buyers
- Create and edit your to-do plans to best match the needs of your sales team
- Use a landing page for special events to automatically assign leads to certain categories
- Set Auto-Responders
- Look up email blast analytics

WHO SHOULD WATCH THIS TRAINING VIDEO - SALES MANAGERS AND ADMINISTRATORS

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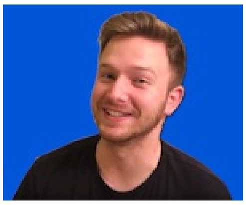

Zack Toler

A Sales Manager's job is never done! That's why we created this training video - to make your life easier. While you watch, you'll learn about customizing your CRM specifically to your sales teams and their personal goals. We will also teach you how to stay in touch with group e-mail blasts, and how to grab leads easily from any event!

No Time For Videos:

CREATE, UPDATE, AND EDIT FLAGS

As an Administrator, you have access to edit and add flags to your CRM. Flags are a great way to separate your sales leads into specific groups, and to effectively market to those individuals in the future. Flags are unlimited, but don't OVER categorize - your sales team won't know how to choose the right flags!

CUSTOMIZE TO DO PLANS FOR YOUR SALES TEAM

We start you out with preset to-do plans, but also give you the ability to set them up specific to your sales team and their needs. You can even create customized action sets to each salesperson if you want to get really fancy!

CREATE LANDING PAGES TO CAPTURE LEADS

If your dealership is running an event, or you're renting a booth at a trade show - landing pages are the perfect way to get customer's lead information quickly and on the fly. Landing pages are editable and customizable with any information you want to capture, and will automatically enter that customer into your CRM. You can set specific deal owners, stages, flags, and more on landing pages to

STAY IN TOUCH WITH EMAIL BLASTS

Using the marketing tool in our CRM allows you to send out email blasts to your customers. The email blast is a simple way to create quick emails to send out to a mass group of people, and the tool will even allow you to track who in the sales team is using it and what results they're getting.

keep leads organized.

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