

Solutions for Accounting bluebirdCRM

Onsite Act! training



empower Act! users to build your business

Company-specific Act! User & Administrator training delivered on your premises to meet with the needs of your business & your staff.

Act! email marketing training including best practice guidance, template design and Swiftpage product orientation.



Call us now to discuss your Act! training day

t. 0115 840 5075 | e. enquiries@solutionsforaccounting.co.uk
www.solutionsforaccounting.co.uk

Why Solutions?

We run Act! training sessions that are dedicated to your specific business needs.

As well as the operation and administration of the software, we like to build an understanding of how your business uses Act! This enables us to structure the training to help your staff get the best from the system, making it appropriate to their needs and those of your business.

We prefer to train your staff on your own premises, provided that you can make a dedicated training/meeting room available (we can bring a PC projector and screen if necessary).

Because we typically cover a broad range of features, and we want delegates to feel comfortable with what they have learned, we include **30 days of post training support** with all on-site training sessions. Delegates may call us as often as they like during this period to refresh their knowledge or seek clarification on any Act! related topic.

Our trainers are Act! Certified Product Specialists. The experience that we have gained in providing dedicated Act! training to well **over 700 UK businesses** has established Solutions for Accountig as the UK's leading Act! training company.



Before we begin ...

To ensure that your training session will have the most positive impact, please take the time to consider its objectives.

What (specifically) would you like the training to achieve? For example, objectives might include (but are by no means limited to):

- Empowering individual users to be more effective during customer interactions
- Making users more comfortable and confident in their day to day use of Act!
- Improving the adoption of Act! across your business
- Setting up the system to support your operational processes efficiently
- Accurately monitoring Sales Opportunities and Pipeline Forecasts
- Understanding reporting to effectively manage activity
- Monitoring KPIs to support management decision making
- Establishing the most reliable and efficient technical infrastructure for Act!
- Setting up remote access via Web browser or Mobile Device (online and offline)

No two training sessions are alike...

...as each one is specific to the needs of our client, but the following examples help to illustrate some of the topics that we typically cover:

Basic User Training

Objective: To provide new Act! users with an entry-level understanding of the basic features of the software. On completion of the session, users will be able to navigate successfully around the system and use features appropriate to 'browse', 'restricted', and 'standard' level access.

Content summary:

- Introduction to Act!: Screen navigation, menus, icons and tabs
- Contacts: Create new Contacts, amend and delete Contact records
- Search for a Contact or group of Contacts (using lookups)
- Companies: Create and amend Company records, understand Company structure
- Groups: Create and amend Group records. Dynamic membership criteria
- Calendar: Working with the Calendar including synchronisation with Microsoft Outlook
- Activities: Creating activities. Working with Activity Series and Alarms
- Email: Recording MS Outlook email Histories within Act! Contact records
- Opportunities: Creating and managing Sales Opportunities
- Documents: Creating (email and letter) mail merges based on Act! templates
- Reports: Using Act!'s standard reporting outputs and Dashboard views

Advanced/Administrator Training

Objective: To empower Act! Administrators to exercise full local control of their own databases. On completion of this session, Administrators will be able to configure the more complex elements of Act! and manage all aspect of the system with significantly reduced external assistance.

Content summary:

- Database customisation including the management of fields and drop-down lists
- Layout design: adapting the Act! screens to present data to users in the most intuitive format
- Data security issues; setting password policies and managing user and field level security
- Multiple contacts: Amending groups of Contact records, applying global changes
- Advanced Searches: Performing advanced Lookups and Queries
- Smart Tasks: Setting up and managing automated workflows
- Reporting: Customisation of Act! report templates and Dashboard views
- OLE/ODBC: Extracting data from SQL data tables that host the Act! database (for reporting etc)
- Import and export: Understanding the database structure and how to import from external sources
- Synchronisation setup and management to support remote users with offline databases
- Web access configuration and management (Act! Premium only)
- Mobile ccess: Configuration of Act! Premium for Web for the html5 mobile device interface

Sessions are run on an informal interactive 'workshop' style basis and there will be plenty of opportunity for discussion and questions and answers.

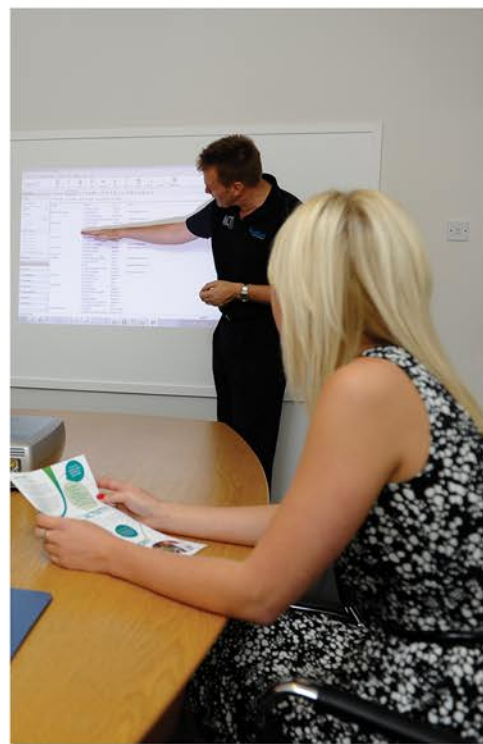
The above sessions may be run as a half day course. In these circumstances, an overview of each element will be provided but there will be limited opportunity for discussion and Q and A at the conclusion of the session.

Act! eMail Marketing Training

Objective: To provide detailed instruction in the use of the powerful Swiftpage Act! eMail Marketing platform. The session will also include a range of 'best practice' tips which will help delegates maximise the effectiveness of their email marketing campaigns.

Content summary:

- Broadcasting bulk emails from within Act!
- Permission based email and UK email marketing law
- Deliverability and getting through to the Inbox (spam filtering)
- Protecting your sender reputation by communicating value
- Tips for getting your emails opened and read
- Using personalisation to improve 'Click Through' rates
- The importance of (and how to manage) timing & frequency
- Opens, Clicks, Opt-Outs and what it all means
- Reporting email response data back into Act!
- Structuring your landing pages for maximum impact
- Making sense of interactive email marketing & Social Media
- Extending your reach through Viral email marketing
- Creating and managing 'Drip Marketing' campaigns
- Working with Smart Tasks to automate email marketing



What our clients have to say...

"You won't find anyone who has a better knowledge of Act! or email marketing than the team at Solutions. The training is first class, and you know you're in safe hands..." **David Bowler, Sibbalds Ltd**

"An excellent training session with an extremely knowledgeable Trainer. Whilst I have used Act! previously, I learned so much about many additional functions that I never realised the system was capable of" **Theresa Percival, Clearview Traffic**

"The quality of training that Solutions for Accounting provided was exceptional and I'm very happy that I chose them. They have extensive knowledge of Act! and the eMail Marketing tool" **Renee Ooi, Project Fire Products**

"Solutions exceeded our expectations, we would definitely recommend them" **Kim Kipling, PCB Piezotronics Ltd**

"An Excellent trainer, very flexible & adapted the training to suit our specific requirements" **Sharon Thornhill, Smith of Derby**

"Solutions for Accounting came into the business with a clear understanding of the hurdles we were facing and during the course of the session, Will managed to knock away any artificial barriers to progress by creating confidence in the system and getting everyone up to speed in a light hearted yet professional way" **Wayne Stant, GoldenRiver Group**

"There was a very mixed level of experience and working knowledge of Act! in the group and Will (Ingleby) was able to adapt his teaching method accordingly - and actually managed to make the learning experience fun and enjoyable!" **Eira Evans, NBC Group**

"Excellent training with knowledgeable staff. I would recommend Solutions for Act training" **Paul Nicholls, Phabrix Ltd**

"We received excellent training from Solutions for Accounting. The trainer was clear, informative and made it very easy to take in all the requirements we had for our training. He kept us motivated & engaged and we would highly recommend this training to any organisation" **Chrissy Ogonnaya, Mlad UK Ltd**



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