

<b>Level:</b>	Undergraduate / Graduate	<b>Duration:</b>	4 x 3 hours
<b>Technical requirements:</b>	Internet connexion with standard compliant webbrowser	<b>Contributors:</b>	Jean-Paul Smets Jacques Honoré

**Description:**

- The first goal is to **teach what is a CRM system** and to explain **what is a ticket and what is an event**.
- The second goal is to **teach universal workflows** associated to the tickets and events in a CRM system.
- The third goal is to **teach how to categorise your prospects**.
- The last goal is to teach **how to produce useful reports** in order to manage your sales efforts in an efficient way.

**Session 1: Managing your contacts**

- [Presentation of Careers and Assignments](#)
- [Tutorial 1: How to create persons](#)
- [Tutorial 2: How to create Organisations](#)
- [Tutorial 3: Linking persons and organisations](#)

**Session 2: Tracking customer interactions - CRM Events**

- [Presentation of incoming and outgoing events](#)
- [Tutorial 1: How to create Events in campaigns](#)
- [Tutorial 2: How to post outgoing events](#)
- [Tutorial 3: How to request someone to post](#)

**Session 3: Organising the events - CRM Tickets**

- [Presentation of Tickets and Campaigns](#)
- [Tutorial 1: How to create campaigns](#)
- [Tutorial 2: How to process incoming events](#)

**Session 4: Create CRM reports**

- [Tutorial 1: Create Reports](#)
- [Tutorial 2: Create Gadgets](#)

## **Evaluation: Categories customisation**

- [Evaluation Document](#)
- [Evaluation Spreadsheet Sample](#)
- [Evaluation Spreadsheet Template](#)