

# POWER TIME CORPORATION

## Microsoft Dynamics CRM QuickStart Training

### **Customer Relationships – The Key to Setting Yourself Apart**

#### **The Basics**

*CRM Screens and Tabs*  
*CRM Outlook vs Web Client*  
*What's in a record*  
*Finding Contacts*

#### **Starting Your Day**

*Checking what's scheduled*  
*Making your morning calls*  
*Taking notes*  
*Sending and tracking emails*  
*Attaching files to contacts*  
*Scheduling callbacks, todo's, and meetings*

#### **After Your Lunch Networking Meeting**

*Adding new contacts*  
*Quick followup*  
*Tracking Opportunities*  
*Using Lookups to sell*  
*Slicing and Dicing your Data*  
*Reporting your results*

#### **Time to Hit the Road**

*Accessing your CRM data when you're away from the office*

#### **Power Time Training Philosophy**

Our goal in every Power Time training class is that our students will find it the most useful training they have ever taken. Every class should make your job easier and make you more money. You'll never sit through lectures at Power Time. All instruction is geared to your company, your job, and the way you do business.

#### **Power Time ... Mastering time through the power of technology**

In the intensity of today's competition, relationships are the key to success. But building relationships takes time. At Power Time, we focus on making machines do the tedious, repetitive work they do best so you have more time to do the things only people can do – develop relationships with other people. We teach you how to have more perfect customers – profitable, repetitive, loyal, and pleasant.

#### **Available CRM Classes**

In addition to this CRM Quickstart class, Power Time offers Advanced CRM User and CRM Administrator classes and hourly specialized training.

The CRM Quickstart Class is scheduled for your company. It is a 3-hour class held in the Power Time Training Center, at your office, or across the web. Tuition is \$149 per student, and there is a three-student minimum. Classes are scheduled upon Power Time's receipt of your tuition.

Call Susan or Erin at 713.995.8455 for dates and reservations.



### **Power Time Corporation**

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***Microsoft Dynamics CRM & Sage ACT!***

***Consulting, Customizing, Implementation, Training***