

CRM BASICS with

Begin Application Onboarding Workshop

2 - Hours
Hands-on,
In-person
Workshop



Customers

BONUS
1-Year
Free BEGIN
Subscription

Who Should Attend

Small Business Owners,
Sales Professionals, and
Entrepreneurs

DASHBOARDS
METRICS
ANALYTICS

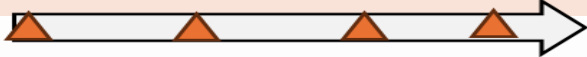


Workshop Objectives

- ✓ Understand the importance of leveraging customer data.
- ✓ Learn effective data gathering, automation, and organization processes.
- ✓ Set up opportunities pipelines and improve conversion rates through repeatable processes.
- ✓ Build frameworks to provide insightful metrics and analytics.
- ✓ Introduction to Begin as an ideal CRM for small businesses and setup of Begin:
- ✓ Learn how to set up and manage contacts, deals, and pipelines in Begin.
- ✓ Automate Begin tasks and track sales performance efficiently.
- ✓ Get hands-on experience with key CRM features to complete Begin setup.



PIPELINE TRACKING



Materials Needed:

- Laptop for each participant
- Internet access
- Excel template (provided) for preparing attendee-specific business data to bring to the class.