



## SageCRM Training and Coaching

### Built-in training tools help new users become old pros

Using any CRM system for the first time can be very intimidating for users. It is imperative that users are comfortable with the system from day one to encourage organization-wide adoption. At Sage Software, we realize the importance of user adoption and so we have designed a range of training and coaching tools to assist with the initial set up and to provide continuous education as the solution is used and leveraged more and more.

SageCRM features a host of training and coaching tools included with the software to assist new and existing users, ensuring that SageCRM is understood, adopted, embraced and used across the organization. These tools assist all users in companies with new installations of Sage CRM. Plus, new hires in businesses with existing installations also benefit. By helping your company's employees gain a stronger understanding of the system, the SageCRM training tools combat user resistance, a major stumbling block for CRM adoption.

### BENEFITS

Equip users with the fundamental skills required for navigating and working with SageCRM

Improve user adoption by fostering confidence and ensuring users are never lost in the system

Expedite the implementation process with wizards and videos

Eliminate confusion with Coaching Captions that appear on most screens

Assist users in setting up their own preferences

Provide easy access to product manuals and documentation for quick reference



◀ SageCRM helps users become more proficient with the software by offering a series of built-in training and coaching resources including quick tips, videos, wizards, and more.

### About SageCRM

SageCRM is an easy-to-use, fast-to-deploy, feature-rich Customer Relationship Management solution with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a Web browser.

Feature	Description	Benefit
<b>Coaching Captions</b>	Coaching captions appear on most of the standard screens throughout SageCRM. Administrators can customize and edit the coaching caption content to meet the requirements of their particular organization. As users familiarize themselves with SageCRM it is possible to minimize coaching captions and ultimately turn them off.	The coaching captions are designed to educate users as to what is happening on the current screen. This ensures that users understand what they are looking at and working with, eliminating uncertainty, fostering confidence, and ensuring they are never lost in the system.
<b>Videos</b>	SageCRM offers a suite of training videos.	Our suite of self-paced training videos provides users with the opportunity to access training materials as and when necessary. The videos complement our documentation by providing easy to follow, easy to understand, and easy to digest instructional information that highlights the major features and areas of the product. These quick presentations equip users with all the basic knowledge and skills required for navigating and working with SageCRM. This allows the user to access information and training on an as needed basis and ensures that all users are educated to a uniform level.  In addition, we understand that administrators may also require assistance and we offer a selection of videos tailored to their particular needs. This expedites the implementation process as administrators can get results fast.
<b>Wizards</b>	SageCRM provides users and administrators with wizards.	Wizards reduce set up time ensuring fast deployment of SageCRM. The preferences wizard ensures that users have the ability to set their own preferences easily, thus individual usability is enhanced and adoption rates increased. User behavior and preferences change over time and so it is possible to revisit the wizard time and again to change preferences.
<b>Quick Tips</b>	SageCRM offers tips on frequently used items in the system, known as Quick Tips.	SageCRM offers tips in relation to recurring themes, which makes using SageCRM easier and more efficient. Quick Tips also encourage continuous learning in long-term users.
<b>Quick Links</b>	SageCRM provides links to documentation.	Access to detailed documentation instantly.

### Sage Software University

In addition to the training resources provided with SageCRM, you can further enhance your skills by enrolling in training courses through Sage Software University. A complete range of classroom and online training options are available at [www.sagesoftwareuniversity.com](http://www.sagesoftwareuniversity.com).

### ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

