

CONTACT MANAGEMENT

Lesson Plan - September 18, 2021

At the end of the *Contact Management* lesson, the client and targeted users will be able to centralize the coordinates and information of contacts, such as employees, suppliers, actual and potential customers, resources, or others, in **maestro***. The user will also be able to perform mass mailings and save a history of these mailings.

Unit CONTACT01 - Preliminary Analysis and Configurations

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs and requirements for contacts in maestro*, in addition to performing the necessary configurations.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Analysis Configurations <ul style="list-style-type: none"> Security Management General Settings 	<ul style="list-style-type: none"> Introduction to the centralization of contacts and their coordinates, personalization, and automation of emails Discussion on the current and future process of contact management (strengths and weaknesses); Set up of the required configurations for the implementation; <ul style="list-style-type: none"> Configuration of administration and other user accesses; General Settings - General: verification of the email software; General Settings - Miscellaneous: check if SMTP is on the Cloud. Decision-making. 	15 min	<ul style="list-style-type: none"> Training document CONTACT01 	Pilot Users

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Reflect on the discussions. 			

Unit CONTACT02 - Contact Management 101

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will be able to save contact coordinates in maestro* and send them messages.</p>	<ul style="list-style-type: none"> • Contact Management <ul style="list-style-type: none"> • Mailing Configurations • Maestro* Forms Links • Contact Groups • Distribution Lists • Send a Message • Mailing Configurations • Transmittal Log • Synchronize <i>Outlook</i> Contacts 	<ul style="list-style-type: none"> • Explanation of the different types of contacts (contact, compagnie, and location) as well as three methods to create a contact; • Import of projects, suppliers, customers, and employees; • Creating a contact: <ul style="list-style-type: none"> • Demonstration of the link between the contact and the employee file and user account; • Location: used for projects; • Other information: password for the paystub. • Link between the contacts and their respective companies; • Recommendation: when hiring an employee, complete the employee file and the 	2h	<ul style="list-style-type: none"> • Training document CONTACT02 	<p>Pilot Users</p>

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<p>contact - option linked to their maestro* user account;</p> <ul style="list-style-type: none"> • Contact search;; • Demonstration of the copying of an address with the clipboard; • Creating a contact groupe (project); • Creating a distribution list; • Explanation of the procedure to import contacts through an <i>Excel</i> file; • Creating contact lists according to the client's needs: dynamic filter of the contact type; • Sending a message: <ul style="list-style-type: none"> • for a contact; • for as distribution list; • for a group (project); • Maestro* forms links by contact - company; • Mailing configurations: creation of a paystub mailing and other client requests; • Demonstration of the communications history; • Warning on the use of the <i>Outlook</i> contact synchronization. 			

Unit CONTACT03 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will have carried out the tests and verifications to use the contact management functionality in maestro* , in accordance to the company's needs.	<ul style="list-style-type: none"> Validation of the correspondence of the contacts with the contact types Testing access to confidential contact information Tests related to mass mailings: <ul style="list-style-type: none"> Paystub Invoicing Customer Statements Tests related to the maestro* forms links 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Test Assistance; Validations. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Complete Integrated Tests</i> 	0.5h	<ul style="list-style-type: none"> Integrated tests 	Pilot Users

Unit CONTACT04 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to manage contacts in maestro* .	N/A	<ul style="list-style-type: none"> Validate learnings Review of the security settings applied <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Preparation of the next trainings: Procurement</i> 		Aquired competencies Form	Pilot