

## Welcome to SharpSpring!

The trainings below will be accomplished through a blend of online meeting sessions and discussions. We've segmented these sessions into:

Required Training

Flexible Training

The Onboarding process is designed to be a comprehensive, flexible program personalized to each partner. As a new user, you'll be paired with an Onboarding Specialist to guide your implementation & ensure your success within our application.

Below is an overview of the suggested meeting sessions to complete during the first 60 Days of our partnership.

### Onboarding Introductory Call



**Attendees:** Primary Contact & Account Manager

✓ **Call Objectives:** Review Goals, Overview the Onboarding process, Clarify Expectations & Discuss Next Steps

### Kickoff Call



**Attendees:** Agency Principal, All Key Team Members

✓ **Call Objectives:** An overview of the SharpSpring application. This session focuses on an introduction to the SharpSpring application and completion of the basic setup.

### Integration



**Attendees:** Primary Contact, Tech Resource, Your Developer

✓ **Call Objectives:** Complete SharpSpring setup by integrating with the tools/systems you currently use. Will require a team member with access to your domain.

Additional training calls continued on next page.

### Onboarding Exit Call



**Attendees:** Primary Contact, Onbarder, & Account Manager

✓ **Call Objectives:** A review of the Onboarding process and an introduction to SharpSpring's Customer Success Team.

The flexible training calls below will be between 30-60 minutes long. They can be personalized and combined as needed. These calls can occur at your own pace, and can be organized in any order. You're not limited to these sessions, please consult with your Onboarding Specialist to cover any additional materials.

## Contact Manager & CRM



**Attendees:** Primary Users, Content Creators



**Call Objectives:** Review the processes for creating and managing contacts, using SharpSpring Personas, and the functionality of the sales & opportunities dashboard.

## Form Creation & Integration



**Attendees:** Primary Users



**Call Objectives:** Create and style easy to customize forms with our SharpSpring Form tool, or work with your Onboarder to integrate with the 3rd Party forms you currently use.

## Email Functionality & Media



**Attendees:** Primary Users, Content Creators



**Call Objectives:** A step-by-step walkthrough to creating, editing, and sending trackable emails and media within SharpSpring.

## Landing Pages & Blogs



**Attendees:** Primary Users, Content Creators



**Call Objectives:** Review the process and best practices for single Landing Page creation, designing Landing Page Funnels, and publishing blogs in SharpSpring.

## Automations & Lists



**Attendees:** Primary Users



**Call Objectives:** Learn how to create, modify, and test automation tasks, workflows and lists. Review basic automations, segmentations, and best practices.

## Analytics, Tracking & Reports



**Attendees:** Primary Users



**Call Objectives:** Review SharpSpring's various reporting functionalities and learn how to create unique tracking for specific marketing tactics.

## Creating a Marketing Campaign



**Attendees:** Primary Users, Marketing



**Call Objectives:** To work with your Onboarder to create a personalized marketing strategy, making use of a variety of tools within the application. (Can be repeated as required).

## Dynamic Content Overview



**Attendees:** Primary Users, Marketing



**Call Objectives:** Learn how to create content personalized to each contact with the dynamic functionality of our email and landing page tools.

## Advanced Automation Strategy



**Attendees:** Primary Users



**Call Objectives:** Review internal vs. external automation, trends & concepts in marketing automation, and strategies for automating additional processes.

## SharpSpring API



**Attendees:** SharpSpring Support, Your Developer(s)



**Call Objectives:** Review the capabilities of the SharpSpring Open API to connect your 3rd Party application to our internal CRM.

## CRM Migration



**Attendees:** SharpSpring Support, Partner Resource



**Call Objectives:** Review data configuration and formatting requirements for a successful CRM migration. Work directly with our team to complete migration.

## Shopping Cart



**Attendees:** SharpSpring Support, Your Developer(s)



**Call Objectives:** An overview and setup of SharpSpring's Shopping Cart Integration functionality. Requires connecting to an external shopping cart tool.