

## IRON Professional Services Training Packages

Contact [services@ironsolutions.com](mailto:services@ironsolutions.com) for pricing & scheduling or to build a custom training package for your organization

<b>Package:</b>	Operational Assessment
<b>Objective:</b>	Review and document all parts of the Sales Organization to understand current IRON HQ usage including written recommendations to increased user adoption and reporting.
<b>Audience:</b>	IRON Administrator, Executive Sponsors, Sales Managers, Sales Reps
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Review existing processes and assess user adoption.</li> <li>2. Documentation of existing work flows.</li> <li>3. Provide recommendations and discussion of next steps.</li> </ol>
<b>Time:</b>	8 hours <ul style="list-style-type: none"> <li>- 4 hour of process reviews</li> <li>- 4 hours for process mapping documentation &amp; discussion of next steps</li> <li>- <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b></li> </ul>

<b>Package:</b>	IRON HQ Set up Training Package
<b>Objective:</b>	Provide a basic overview of IRON HQ set up
<b>Audience:</b>	IRON Administrators, Managers
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Basic Navigation and Overview of IRON HQ Inventory, what each tab means</li> <li>2. Walkthrough of the existing Opportunity Process</li> <li>3. Creation up to 5 reports and searches in IRON HQ</li> <li>4. Publishing dashboards and added additional content to IRON HQ including files and documents</li> </ol>
<b>Time:</b>	12 hours <ul style="list-style-type: none"> <li>- 4 hours of training</li> <li>- 8 hours pre/post work &amp; project management</li> <li>- <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b></li> </ul>

<b>Package:</b>	Advanced IRON HQ Training
<b>Objective:</b>	Building off lessons learned from the IRON HQ Setup training package. This program is where IRON Admin and Managers will learn the more advanced features of IRON HQ.
<b>Audience:</b>	IRON Admin, Managers
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Overview of reports, searches and dashboards in IRON HQ</li> <li>2. Review how to add additional content to IRON HQ including files and documents</li> <li>3. Overview of Marketing abilities within in IRON HQ</li> </ol>
<b>Time:</b>	8 hours - 4 hours of training - 4 hours pre/post work & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	Opportunity Process Review
<b>Objective:</b>	Learn how to enter and track Opportunities within IRON HQ. Discussion of common best practices & reporting requirements around the Opportunity record.
<b>Audience:</b>	IRON Administrator, Sales Managers, Sales Reps
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Review existing workflows</li> <li>2. Addition of custom fields to allow data to flow from Sales Rep to Manager to Admin via checkboxes or statuses.</li> <li>3. Review, Creation and Automation of up to 5 Opportunity status reports</li> <li>4. Ability to set up instant notification of opportunity changes</li> <li>5. Setting up of process map once plan is in place</li> <li>6. Creation of Step by Step job ids showing how the Opportunity move around the dealership.</li> </ol>
<b>Time:</b>	16 hours - 4 – 1hour Training Sessions - 10 hours for document creation & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	Customer and Activity Management Package
<b>Objective:</b>	Training on best customer & activity management practices and ways to tracking customer demographics. Learn how to enter in customer activities and track them in IRON HQ.
<b>Audience:</b>	IRON Administrator, Sales Managers, Sales Reps
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Addition of X custom fields to hold data that is needed for customer.</li> <li>2. Modification of the customer or activity forms to match dealer needs.</li> <li>3. Set up of automated 5 reports/searches to track activities or/and customers</li> </ol>
<b>Time:</b>	10 hours - 2 – 1 hour Training Sessions - 8 hours for account customization, report creation & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	Opportunity Creation and Tracking Training Package
<b>Objective:</b>	Creating opportunities from all sources, creating and tracking customer equipment and appraising customer equipment. Tracking and selling of opportunities from both Sales Rep and Sales Manager point of view.
<b>Audience:</b>	IRON Administrator, Sales Managers, Sales Reps
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Creation of a basic IRON Builder Opportunity with trade from trade guide.</li> <li>2. Adding customer equipment, appraising it and searching for customer equipment</li> <li>3. Creating an Inventory Opp. with a trade from customer equipment</li> <li>4. Creating an Opportunity with manual units</li> <li>5. Review of Opportunity creation plus cloning of opportunities</li> <li>6. Tracking Opportunities from Home Dashboard, customer screen and using Statuses</li> <li>7. Manager Session: Tracking and selling of opportunities.</li> </ol>
<b>Time:</b>	14 hours - 7 hours of Training - 5 hours Pre/Post support work & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	Customer Management and Activity Management Training Package
<b>Objective:</b>	Training on best customer management practices and ways to tracking customer demographics. Learn how to enter in customer activities and track them in IRON HQ.
<b>Audience:</b>	IRON Administrator, Sales Managers, Sales Reps
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Customer screen and filling out of customer information</li> <li>2. Creating activities in IRON HQ</li> <li>3. Tracking customers and activities in IRON HQ</li> <li>4. Management Session: Reports on activities and activity report automation</li> <li>5. Review of customer and activity management</li> </ol>
<b>Time:</b>	10 hours - 5 hours training - 5 hours pre/post work & Project Management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	Inventory Management Package
<b>Objective:</b>	Training on how to track, add, edit and delete equipment in IRON HQ.
<b>Audience:</b>	IRON Administrator, Managers, Inventory Controller
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Basic Navigation and Overview of IRON HQ Inventory, what each tab means</li> <li>2. Review the various methods to create units (IRON Builder, Manual, Uploads)</li> <li>3. Creation of up to 4 reports in IRON HQ Inventory</li> <li>4. Review the process of deleting/cloning of inventory units</li> </ol>
<b>Time:</b>	5 hours - 3 hour training - 2 hours pre/post work & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	IRON HQ Search, Reports & Dashboards
<b>Objective:</b>	This comprehensive course teaches users how to use the IRON HQ Search, Reports and Dashboard tools to create their own custom searches, reports and dashboards to drive analysis and enforce business processes.
<b>Audience:</b>	IRON Admin & Managers
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Overview of IRON HQ analysis tools:           <ol style="list-style-type: none"> <li>a. Reports</li> <li>b. Searches               <ol style="list-style-type: none"> <li>i. Customers &amp; Equipment</li> <li>ii. Opportunities</li> </ol> </li> <li>c. User Dashboards</li> </ol> </li> <li>2. Discussion regarding the types of analytics your looking to generate</li> <li>3. Provide assistance with the creation of custom Reports, Searches &amp; Dashboards</li> </ol>
<b>Time:</b>	10 hours - 4 hours of training - 6 hours pre/post work & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>

<b>Package:</b>	IRON HQ Marketing
<b>Objective:</b>	Introduce the Marketing Automation features and functions within IRON HQ.
<b>Audience:</b>	IRON Admin, Sales Managers, Marketing
<b>Includes:</b>	<ol style="list-style-type: none"> <li>1. Walkthrough of IRON HQ Marketing Abilities</li> <li>2. Creation of Target Groups</li> <li>3. Building and Launching Campaigns</li> </ol>
<b>Time:</b>	4 hours - 2 hours of training - 2 hours pre/post work & project management - <b>Contact <a href="mailto:services@ironsolutions.com">services@ironsolutions.com</a> for pricing &amp; scheduling</b>