

Welcome to SharpSpring!

Our onboarding process is a comprehensive and flexible training program that can be personalized to fit your exact needs. You'll be paired with an Onboarding Specialist who will guide your training and work closely with you to ensure your success with the platform.

Below is an overview of the training sessions you'll complete with our team during the first 60 days of the partnership. We segmented these sessions into:

Required Training


Flexible Training

Onboarding Introductory Call

 Attendees: Primary Contact & Director of Onboarding


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

Kick-off Call

 **Attendees:** Primary Contact, All Key Team Members


✓ **Call Objectives:**
This session focuses on providing an overview of the SharpSpring application and helping with 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.

Configuration

 **Attendees:** Primary Contact, Key User(s)

✓ **Call Objectives:**
Work with your Onboarding Specialist to set up your data and customize your SharpSpring instance.

Additional training calls continued on next page.

Onboarding Exit Call

 Attendees: Primary Contact & Director of Onboarding

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

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

Contact Manager & CRM



Attendees: Key Team Members, Sales

- ✓ **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: Key Team Members

- ✓ **Call Objectives:** Easily create and style customized forms with the SharpSpring Form tool, or work with your Onboarding Specialist to integrate with the third-party forms you currently use.

Email Functionality & Media



Attendees: Key Team Members, Content Creators

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

Landing Pages & Blogs



Attendees: Key Team Members, Content Creators

- ✓ **Call Objectives:** Review the process and best practices for creating single landing pages, designing landing page funnels, and publishing blogs in SharpSpring.

Automations & Lists



Attendees: Key Team Members

- ✓ **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: Key Team Members

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

Creating a Marketing Campaign



Attendees: Key Team Members, Marketing

- ✓ **Call Objectives:** Work with your Onboarding Specialist to create a personalized marketing strategy that makes use of a variety of tools within the application.

Dynamic Content Overview



Attendees: Key Team Members, 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: Key Team Members

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

SharpSpring API



Attendees: SharpSpring Support, Agency Developer(s)

- ✓ **Call Objectives:** Review the capabilities of the SharpSpring Open API to connect your third-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, Agency Developer(s)

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