



The Blue Building  
4/8 Whites Grounds  
London SE1 3LA

## Project-base Supervisor Training

### Objectives of the Training

KMS User Training aims to prepare clients for full Project-base implementation and subsequent User Training by:

- Confirmation of the business objectives of the Project-base implementation
- Decision making on which Project-base functions and tables are to be used
- Decision making on which data classification fields are to be used, their status (i.e. mandatory or optional) and how they are to be named
- Decision making on which lookup options are to be available for each field
- Decision making on which Word Processor users will use
- Teaching the database Supervisor to implement agreed decisions

### Training Attendees

It is recommended that the following individuals attend the supervisor training:

- Management sponsoring the Project-base implementation
- Database Administrators/Supervisors
- A representative of each user community (e.g. Field sales, marketing, sales support)

NB. Supervisor training is usually more effective with 4 or fewer attendees. A single person may represent several of the functions listed above.

### Customer Preparation for Supervisor Training

Supervisor training covers both the set-up and configuration of Project-base. In order to ensure that the relevant ground is covered as efficiently as possible, it is useful to spend time considering the relevant issues. This is especially relevant to the System Administrator/Supervisor.

### Benefits Sought

Project-base is able to provide a combination of user benefits. However it is not always the case that all benefits are sought immediately. The focus of the training can be improved if some thought is given to the priorities of the various benefits.

The main areas of benefit can be as follows:

- Tracking of Contacts and Projects
- Sales Call Planning, Logging and Monitoring
- Recording, Distribution and Reporting of Calls to Office
- Mailing
- Analysis and Reporting
- Field Sales Database Distribution
- Production and Recording of Quotations and/or Orders
- Management of post sales activities

*Sales* 0207 939 0740  
*Support* 0207 939 0741  
*Fax* 0207 407 2810  
*Email* support@kms-software.com  
*Web* www.kms-software.com



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Marketing - Segmentation and other analysis of the database relating to customers, projects, prospects, industries, regions, competitors, products campaigns etc.; Mailshots to working database or parts thereof; Mailshots to externally sourced databases; Fulfilment of incoming leads; Handling and distribution of project leads from Glenigan or ABI.

Sales Management - Co-ordination of the databases held on field based portable PCs. Analysis of activities of Sales Staff; Region by region analysis; Customer by customer and project-by-project analysis; Individual sales performance and selling cycles.

Sales Staff - Management and tracking of project, customer and prospect contacts; Activity and call planning; Monthly report production.

### **Data Classification**

How do you intend to classify projects, companies and contacts? These classifications have relevance in targeting mailshots, analysing the database and entering data. Tools do exist to reclassify information at a later date but there are clear advantages in getting it right first time. If you intend to record information concerning enquiries raised and orders won and lost, how do you intend to classify these? Which if any fields should be set up for mandatory completion? More mandatory fields mean a more complete database but also less speed in data entry. In preparation for immediate or future splitting up of data across field based portable PCs, how is the data to be allocated to sales staff? Project-base allows an unlimited number of databases to be set up. Is your data to be split amongst more than one database? Alternative databases are also commonly created for secondary uses such as PR contact data or supplier data.

### **User training**

User training is your chance to sell the Project-base concept to your users. Successful training sessions result in enthusiastic users and an auspicious start to your use of Project-base. Whilst the Supervisor training is often an iterative session in a conversational format, User Training is most successful if performed as the structured presentation of a completed system. Please ensure that you have read the KMS document on User Training before attending Supervisor Training.

*Sales* 0207 939 0740  
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*Fax* 0207 407 2810  
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*Web* [www.kms-software.com](http://www.kms-software.com)