

AVIONTÉ CONNECT

CONNECT



Turning Your CRM into a Growth Engine: Maximize What You Already Have

Learn how leading staffing agencies build high-converting sales pipelines, manage opportunities, and leverage tools within BOLD that help drive predictable revenue.

- *This presentation is for informational purposes only.*

Introductions

Welcome to **CONNECT!** Thank you for joining our session.



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Why are we here?

Most agencies have untapped revenue sitting inside their CRM — they just don't have the workflows to unlock it.

BY THE END OF TODAY'S SESSION

- ✓ Developing clearly defined sales stages
- ✓ Implementing the sales workflow
- ✓ Leveraging BOLD CRM's widgets, reports and INSIGHTS to measure success

Why Leads Are Falling Through the Pipeline

Research shows 34% of qualified leads get lost between departments simply because there is no tracking system. Not because the lead was bad — because there was no structure.

Source: Data-Mania, 2026

CRM Sales Tool

No clear picture of where deals are in the pipeline, or what's slowing them down.

No Standardization

Every rep has their own process There's no visibility, no consistency, and no reliable forecast.

Reactive

Outreach happens when there's time — not necessarily when it would have the most impact.

Pipeline Data

The tools are in place, they just have been configured or put to work yet.

Three Strategies to Close the Gaps

Strategy 1 – Nurture and Engage

Nurture and Engage to Drive Conversion



Day 1

Initial Email

- Focus on adding value
- Include industry updates
- Add educational content



Day 3

Call 1

- Lead with a clear message
- Set one intentional goal
- Reference the initial email



Day 5

Email #2

- Build on email + Call 1
- Include a calendar link
- Invite them to a meeting



Day 7

LinkedIn

- Connect if not already
- Re-share your message
- Request a meeting



Day 9

Call 2

- Push to lock a meeting
- Propose a specific date/time
- Get face time with contact



Day 11

Email #3

- Share a client success story
- Reinforce your value
- Close with a call to action.

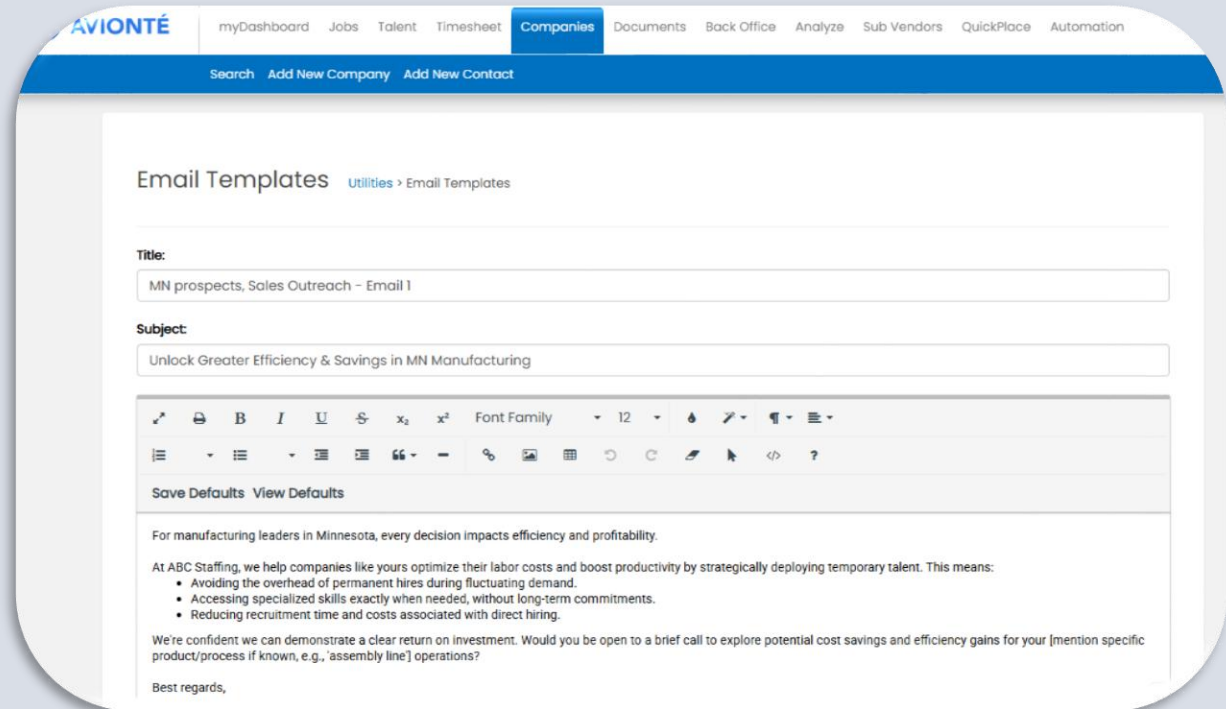
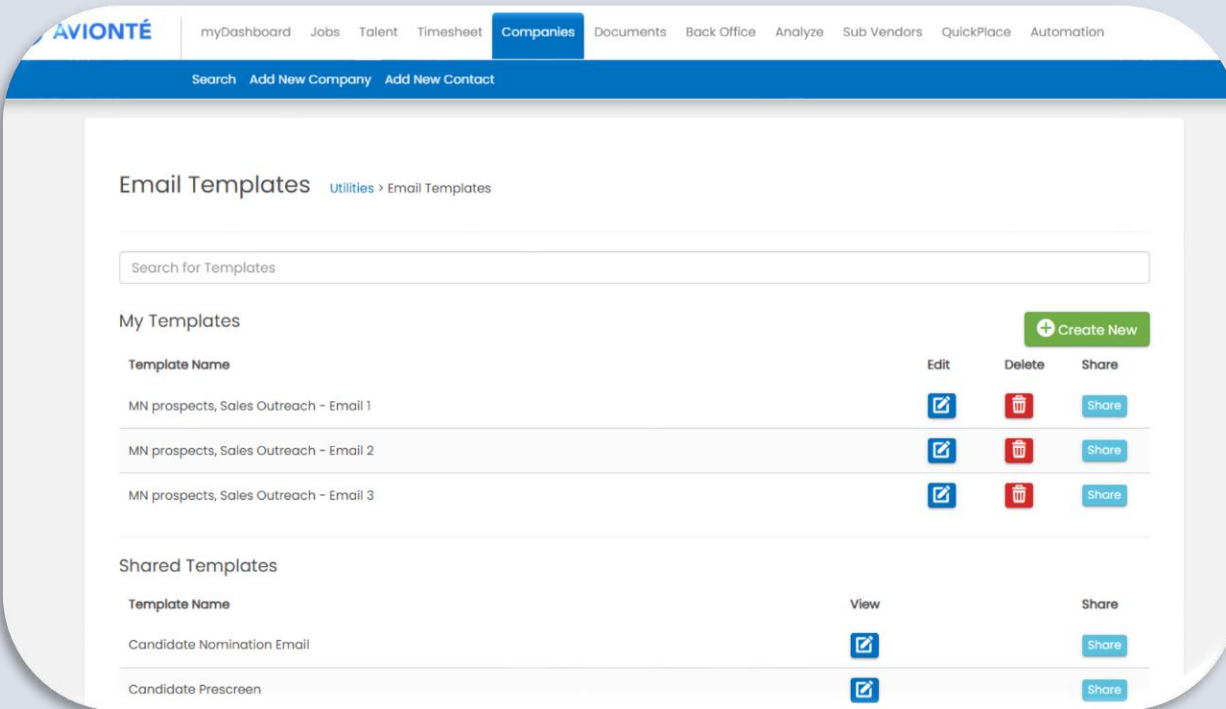


Strategy 1

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 1 – Create the email templates that you plan to use for this campaign



Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 2 – Identify your target audience and save the search

The screenshot displays the AVIONTÉ CRM interface. The top navigation bar includes the AVIONTÉ logo and links to myDashboard, Jobs, Talent, Timesheet, Companies (selected), Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. Below this is a secondary bar with Search, Add New Company, and Add New Contact. The main content area is divided into a left sidebar and a right pane. The sidebar has a 'CRM Terms' dropdown and a search bar with filters for 'Selected Industries: Hospitality' and 'Activities (1)'. The 'Activities' dropdown is open, showing options like 'Show me', 'Contacts Who Have Had', 'Call Completed', and 'Anyone'. Below these are checkboxes for 'Include Inactive Users' and date pickers for 'From Date' and 'To Date'. An 'Add' button is at the bottom of the sidebar. The right pane shows a 'New Tag Preview (Not applied):' section with two tags: 'Show me contacts who have had the activity Call Completed by Anyone' and 'Show me contacts who haven't had the activity Sales Follow-up by Anyone from Jan 1 2025 to Dec 31 2025'. A 'Done' button is at the bottom right of the modal. The background shows a list of contacts with columns for Industry, Name, and Date.

AVIONTÉ

myDashboard Jobs Talent Timesheet **Companies** Documents Back Office Analyze Sub Vendors QuickPlace Automation

Search Add New Company Add New Contact

CRM Terms ▾ Selected Industries: Hospitality × Activities (1) × Type to Search...

Activities 📌

Show me ▾

Contacts Who Have Had ▾

Call Completed ▾

Anyone ▾

☐ Include Inactive Users

From Date

To Date

Add

New Tag Preview (Not applied):

Show me contacts who have had the activity Call Completed by Anyone ×

Applied Activity Search Tags:

Show me contacts who haven't had the activity Sales Follow-up by Anyone from Jan 1 2025 to Dec 31 2025 ×

Done

Saved Searches

- Dormant - Hospitality Accounts
- MN Prospects
- Expiring Company Docs
- Dormant Account Outreach
- Prospect List
- Manage Saved Searches

Industry	Name	Date
Hospitality	Mike McKerns	Jun 12, 2025 1:29 ...
Hospitality	Nick Rayman	
Hospitality	Clare Sodeling	Jun 5, 2025 2:15 ...

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 3 – Use “Mass Actions” to schedule outreach that aligns the cadence.

The screenshot displays the AVIONTE CRM interface. The top navigation bar includes links to myDashboard, Jobs, Talent, Timesheet, Companies (selected), Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. Below this, a secondary bar contains Search, Add New Company, and Add New Contact. The main content area is split into two panels.

Left Panel: CRM Search Results

Filters: CRM Terms, Selected Industries: Hospitality, Activities (1), Type to Search...

Company	Last Contacted	First Name	Last Name	Title
✓ AppleBees	Feb 14, 2024 11:...	Jerry	Smith	Director of
✓ Charlotte Mot...	Jan 26, 2024 6...	Greg	Walter	VP/Genera
✓ Charlotte Mot...	Jan 26, 2024 6...	Garrett	Carter	Vice Presi
✓ Charlotte Mot...	May 28, 2025 ...	Thomas	Vesey	Director of
✓ Chick-Fil-A	May 28, 2025 ...	Carla	Cahill	Customer
✓ Chick-Fil-A	Jun 12, 2025 1:...	Kim	Hermes	Operation
✓ Chick-Fil-A	May 28, 2025 ...	Scott	Brown	Time Appr
✓ Chick-Fil-A	May 28, 2025 ...	Matt	Khan	Marketing
✓ Chick-Fil-A	Feb 27, 2024 1...	Ryan	Kelly	Administra

Total Items: 17 (Selected Items: 17)

Right Panel: 17 Contacts - Add Task

Event Color: [Color selection bar]

Time Zone: (UTC-06:00) Central Time (US & Canada)

User: Mike McKerns Activity: Nurture Email (1) Email: [checked] Calendar: [31] Del: [trash icon]

Date: Aug 11, 2025 Start: 10:45 AM End: 11:45 AM

+ Add Activity User

Include additional email recipients

Email Subject: [text input]

[Rich text editor toolbar]

Cancel [Save]

Strategy 1

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 4 – Leverage your Task List and/or Calendar to stay on track

myDashboard Jobs Talent Timesheet Companies Documents Back Office Analyze Sub Vendors QuickPlace Automation

Dashboard Tasks

Opportunities Talent **Contact Tasks** Hot List

CONTACT TASKS - AT A GLANCE

Today & Past Due	This Week	Next Week	This Month	This Quarter	All Tasks
17	54	51	108	108	108

[View Shared Tasks](#) [Share Your Tasks](#)

☐	Date	Name	Company Name	Title	Phone	Owner	Assigned By	Activity Type	Action
☐	Aug 11 2025 11:45AM	Jerry Smith	AppleBees	Director of Operations		Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☐	Aug 11 2025 11:45AM	Greg Walter	Charlotte Motor Speedway	VP/General Manager	800-455-21414	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☐	Aug 11 2025 11:45AM	Garrett Carter	Charlotte Motor Speedway	Vice President of Operations	800-455-82137	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☐	Aug 11 2025 11:45AM	Thomas Vesey	Charlotte Motor Speedway	Director of Guest Services	800-455-7421747	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☐	Aug 11 2025 11:45AM	Carla Cahill	Chick-Fil-A	Customer Experience Director		Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☐	Aug 11 2025 11:45AM	Kim Hermes	Chick-Fil-A	Operations Manager	9892238893	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 5 – Execute en masse from your Saved Search

The screenshot displays the AVIONTÉ CRM interface. The top navigation bar includes links to myDashboard, Jobs, Talent, Timesheet, Companies (selected), Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. Below this, a sub-navigation bar shows Search, Add New Company, and Add New. The main content area is divided into two panels. The left panel, titled 'CRM Search Results', shows a table of search results with columns for Company, Last Contacted, First Name, and Last Name. The table lists 17 results, all with a 'Last Contacted' date of 'Jul 1, 2025 3:00...'. The right panel, titled 'Send an email to 17 contacts', shows the email campaign setup. It includes a list of recipients: Jerry Smith, Greg Walter, Garrett Carter, Thomas Vesey, John Anderson, Tim Tassopoulos, John Doe, John Thelead, Carla Cahill, Kim Hermes, Scott Brown, Matt Khan, Ryan Kelly, Roger Forester, James McNeil, August Fitger, Jillian Miller (0 recipients have unsubscribed). There is a toggle for 'Include CC Recipients' set to 'Off'. The 'Email Subject' field contains 'Unlock Greater Efficiency & Savings in MN Manufacturing'. Below this, the 'Enter the Email Below' section shows a rich text editor with a toolbar and a list of templates. The 'Templates' dropdown is open, showing a list of templates including 'Candidate Nomination Email', 'Candidate Prescreen', 'Candidate Submittal', 'Client Evaluation Form', 'Customer check in - First Week with temp', 'Health Interview Email', 'MN prospects, Sales Outreach - Email 1', 'MN prospects, Sales Outreach - Email 2', and 'MN prospects, Sales Outreach - Email 3'. The 'MN prospects, Sales Outreach - Email 1' template is selected, showing a preview of the email content. The bottom of the interface shows 'Total Items: 17 (Selected Items: 17)' and buttons for 'Cancel' and 'Send Email'.

AVIONTÉ myDashboard Jobs Talent Timesheet Companies Documents Back Office Analyze Sub Vendors QuickPlace Automation

Search Add New Company Add New

CRM Terms Selected Industries: Hospitality Activities (1)

CRM Search Results

Company	Last Contacted	First Name	Last Name
AppleBees	Jul 1, 2025 3:00...	Jerry	Smith
Charlotte Mot...	Jul 1, 2025 3:00...	Greg	Walter
Charlotte Mot...	Jul 1, 2025 3:00...	Garrett	Carter
Charlotte Mot...	Jul 1, 2025 3:00...	Thomas	Vesey
Chick-Fil-A	Jul 1, 2025 3:00...	John	Anderson
Chick-Fil-A	Jul 1, 2025 3:00...	Tim	Tassopoulos
Chick-Fil-A	Jul 1, 2025 3:00...	John	Doe
Chick-Fil-A	Jul 1, 2025 3:00...	John	Thelead
Chick-Fil-A	Jul 1, 2025 3:00...	Carla	Cahill
Chick-Fil-A	Jul 1, 2025 3:00...	Kim	Hermes
Chick-Fil-A	Jul 1, 2025 3:00...	Scott	Brown
Chick-Fil-A	Jul 1, 2025 3:00...	Matt	Khan
Chick-Fil-A	Jul 1, 2025 3:00...	Ryan	Kelly
Chick-Fil-A	Jul 1, 2025 3:00...	Roger	Forester
Chick-Fil-A	Jul 1, 2025 3:00...	James	McNeil
Chick-Fil-A	Jul 1, 2025 3:00...	August	Fitger
Chick-Fil-A	Jul 1, 2025 3:00...	Jillian	Miller

Total Items: 17 (Selected Items: 17)

Send an email to 17 contacts

Jerry Smith, Greg Walter, Garrett Carter, Thomas Vesey, John Anderson, Tim Tassopoulos, John Doe, John Thelead, Carla Cahill, Kim Hermes, Scott Brown, Matt Khan, Ryan Kelly, Roger Forester, James McNeil, August Fitger, Jillian Miller (0 recipients have unsubscribed)

Include CC Recipients: Off

Email Subject: Unlock Greater Efficiency & Savings in MN Manufacturing

Enter the Email Below:

Templates Save Defaults View Defaults Contact Merge Fields

- Candidate Nomination Email
- Candidate Prescreen
- Candidate Submittal
- Client Evaluation Form
- Customer check in - First Week with temp
- Health Interview Email
- MN prospects, Sales Outreach - Email 1
- MN prospects, Sales Outreach - Email 2
- MN prospects, Sales Outreach - Email 3

Cancel Send Email

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 6 – Complete the Tasks then Rinse and Repeat

AVIONTE myDashboard Jobs Talent Timesheet Companies Documents Back Office Analyze Sub Vendors QuickPlace Automation

Dashboard Tasks

Opportunities Talent **Contact Tasks** Hot List

CONTACT TASKS - AT A GLANCE

Today & Past Due	This Week	Next Week	This Month	This Quarter	All Tasks
0	0	0	0	108	108

[View Shared Tasks](#) [Share Your Tasks](#)

☒	Date	Name	Company Na...	Title	Phone	Owner	Assigned By	Activity Type	Action
☒	Aug 11 2025 11:45AM	Jerry Smith	AppleBees	Director of Operations		Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☒	Aug 11 2025 11:45AM	Greg Walter	Charlotte Motor Speedway	VP/General Manager	800-455-21414	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete
MIKE MCKERNS Account ExecutiveMobile: 610.864.7516Email: mike.mckerns@avionte.com									
☒	Aug 11 2025 11:45AM	Garrett Carter	Charlotte Motor Speedway	Vice President of Operations	800-455-82137	Mike McKerns	Mike McKerns	Nurture Email (1)	Completed Reschedule Both Delete

[Complete Selected Tasks](#) [Delete Selected Tasks](#) mail: mike.mckerns@avionte.com

Strategy 1

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 6a – Complete the Tasks then Rinse and Repeat

myDASHBORD | myDashboard | Jobs | Consultants | Timesheet | Companies | Documents | Back Office | Analyze | Sub Vendors | QuickPlace | Automation

Dashboard | Tasks

Opportunities | Consultants | **Contact Tasks** | Hot List

CONTACT TASKS – AT A GLANCE

Today & Past Due	This Week	Next Week	This Month	This Quarter	All Tasks
17	37	51	91	91	91

[View Shared Tasks](#) [Share Your Tasks](#)

☐	Date	Name	Company Name	Title	Phone	Owner	Assigned By	Activity Type	Action
☐	Aug 13 2025 11:45AM	Jerry Smith	AppleBees	Director of Operations		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☐	Aug 13 2025 11:45AM	Greg Walter	Charlotte Motor Speedway	VP/General Manager	800-455-21414	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☐	Aug 13 2025 11:45AM	Garrett Carter	Charlotte Motor Speedway	Vice President of Operations	800-455-82137	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☐	Aug 13 2025 11:45AM	Thomas Vesey	Charlotte Motor Speedway	Director of Guest Services	800-455-7421747	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☐	Aug 13 2025 11:45AM	Carla Cahill	Chick-Fil-A	Customer Experience Director		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☐	Aug 13 2025 11:45AM	Kim Hermes	Chick-Fil-A	Operations Manager	9892238893	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete

[Complete Selected Tasks](#) [Delete Selected Tasks](#)

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 6b – When working through calls, load your saved search and use the Preview/Fly Out to make the call and record your notes

The screenshot displays the AVIONTE CRM interface. The top navigation bar includes links to myDashboard, Jobs, Talent, Timesheet, Companies, Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. The main dashboard area shows a 'CRM Search Results' table with columns for Company, Preview, Last Contact, First Name, and Last Name. The table lists several contacts, including AppleBees, Charlotte Mo..., Chick-Fil-A, and John Doe. The 'Add Activity' form for Greg Walter is open, showing fields for User (Mike McKerns), Activity (Call Completed), Date (Jul 1, 2025), and Start (12:00 PM). The form also includes a 'Add Activity User' button and a text area for notes.

Company	Preview	Last Contact	First Name	Last Name
AppleBees		Jul 1, 2025 3:0...	Jerry	Smith
Charlotte Mo...		Jul 1, 2025 3:0...	Greg	Walter
Charlotte Mo...		Jul 1, 2025 3:0...	Garrett	Carter
Charlotte Mo...		Jul 1, 2025 3:0...	Thomas	Vesey
Chick-Fil-A		Jul 1, 2025 3:0...	John	Anders
Chick-Fil-A		Jul 1, 2025 3:0...	Tim	Tassop
Chick-Fil-A		Jul 1, 2025 3:0...	John	Doe
Chick-Fil-A		Jul 1, 2025 3:0...	John	Thelea
Chick-Fil-A		Jul 1, 2025 3:0...	Carla	Cahill

Total Items: 17

Greg Walter - Add Activity

User: Mike McKerns Activity: Call Completed Email: ☐ Calendar: ☐ Del: ☐

Date: Jul 1, 2025 Start: 12:00 PM

[+ Add Activity User](#)

Include additional email recipients

8/22/25
8/20/25
8/18/25
8/15/25
8/13/25

Connected with Greg. He expects to ramp up again in the fall and will need about a dozen picker packers for the warehouse. Scheduled a meeting for September 7th.

Cancel Submit

Driving Conversion

Pre-planned outreach using saved searches, email templates and the BOLD task manager

Step 6c – Again, select all the tasks that you just executed and complete them on the task list.

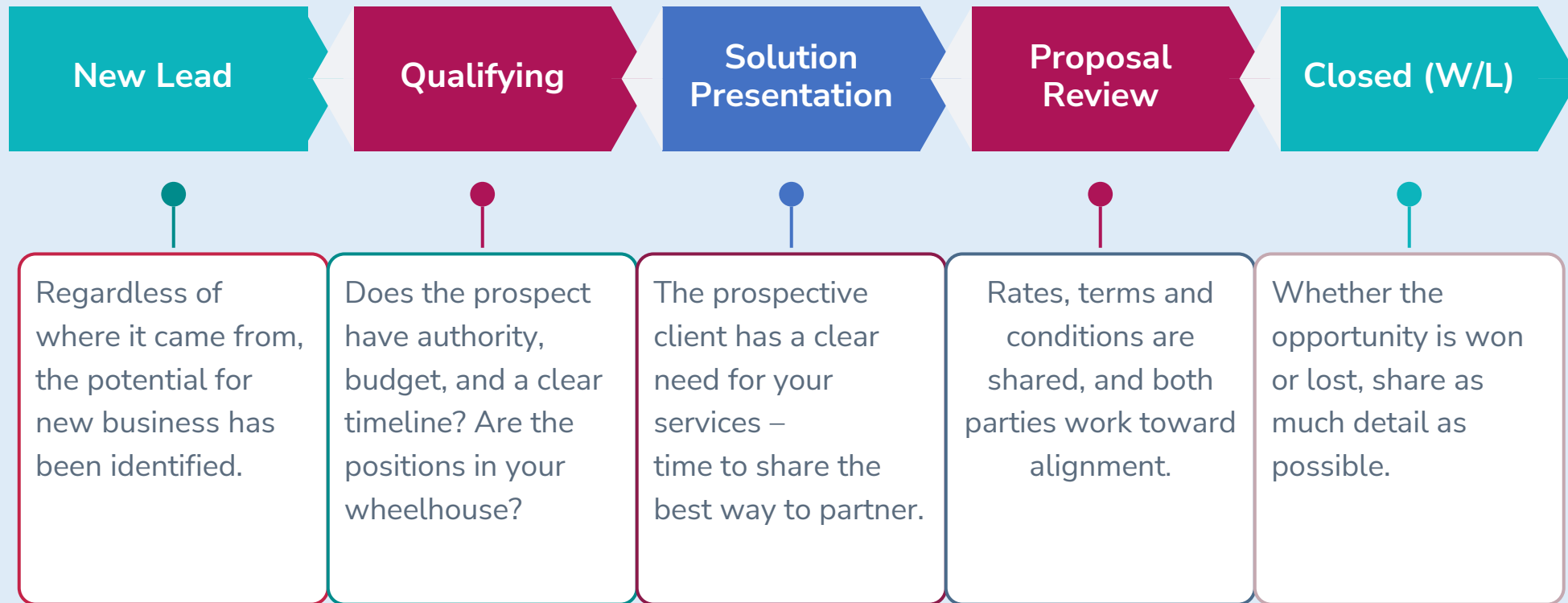
The screenshot displays the AVIONTE BOLD task manager interface. The top navigation bar includes 'myDashboard' and various menu items like Jobs, Consultants, Timesheet, Companies, Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. The main header shows 'Dashboard' and 'Tasks'. The 'Contact Tasks' tab is active, displaying a summary of tasks across different time periods: Today & Past Due (17), This Week (37), Next Week (51), This Month (91), This Quarter (91), and All Tasks (91). Below the summary, there are buttons for 'View Shared Tasks', 'Share Your Tasks', and a search bar. The main content area is a table of tasks with columns: Date, Name, Company Name, Title, Phone, Owner, Assigned By, Activity Type, and Action. The table lists six tasks, all with a status of 'Completed'. A red arrow points to the 'Complete Selected Tasks' button at the bottom left of the table.

☒	Date	Name	Company Name	Title	Phone	Owner	Assigned By	Activity Type	Action
☒	Aug 13 2025 11:45AM	Jerry Smith	AppleBees	Director of Operations		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☒	Aug 13 2025 11:45AM	Greg Walter	Charlotte Motor Speedway	VP/General Manager	800-455-21414	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☒	Aug 13 2025 11:45AM	Garrett Carter	Charlotte Motor Speedway	Vice President of Operations	800-455-82137	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☒	Aug 13 2025 11:45AM	Thomas Vesey	Charlotte Motor Speedway	Director of Guest Services	800-455-7421747	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☒	Aug 13 2025 11:45AM	Carla Cahill	Chick-Fil-A	Customer Experience Director		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
☒	Aug 13 2025 11:45AM	Kim Hermes	Chick-Fil-A	Operations Manager	9892238893	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete

Complete Selected Tasks Delete Selected Tasks

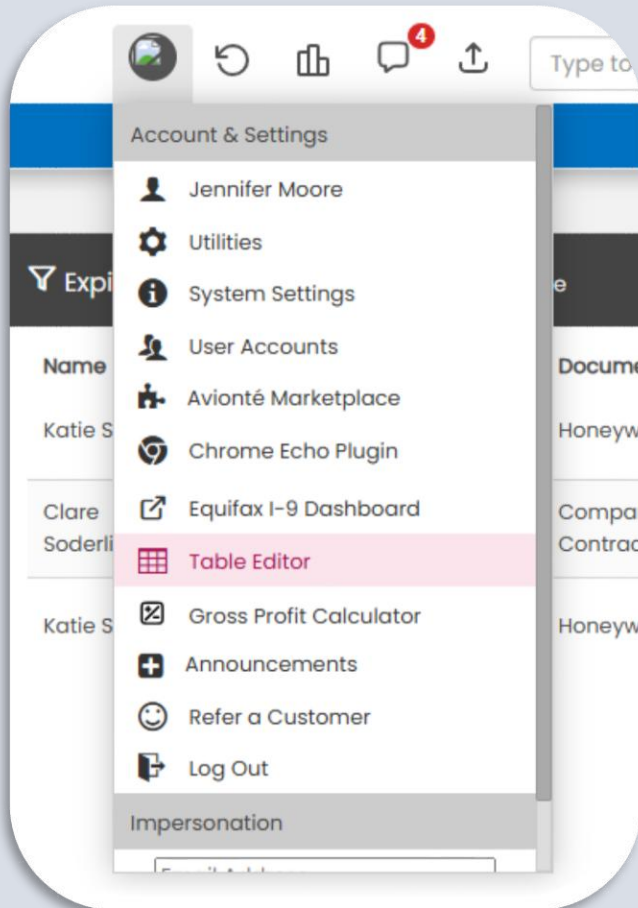
Strategy 2 - Mastering Opportunity Workflows

The 5-Stage Opportunity Pipeline



Opportunity Management

Creating Opportunity Types and Opportunity Stages



Opportunity Types

Create and edit the different types of opportunities.

New Item *

+ Add

Direct Hire Search

Temp Services

Opportunity Stages

Create and edit the different types of opportunities.

New Item *

Item Type *

Select item type

Order

+ Add

Item	Type	Stage Order
Prospecting	Open	1
Req. Gathering	Open	2
Contact Opp Owner	Open	3

Strategy 2

Opportunity Management

Creating New Opportunity on Company Record

The image shows a screenshot of the Airborne Express CRM interface. On the left is a company profile for 'Airborne Express' with a red 'A' logo, contact information, and social media links. The main navigation bar includes tabs for Invoices, History, Contacts, Documents, Organization, Activities, Jobs, Overview, Custom Fields, POs, Opportunities (selected), Restrictions, Timesheets, and Requirements. Below the navigation bar, a blue button 'Create New Opportunity' is highlighted with a red box. Below this button, a message states 'No opportunities here! Go make some!' with a green 'Create New Opportunity' button. On the right, a 'New Opportunity' modal form is displayed. The form contains the following fields:

- Opportunity Contact:** A dropdown menu with 'Nothing selected'.
- Current Stage:** A dropdown menu with 'opp_test'.
- Next Step:** An empty text input field.
- Amount:** An empty text input field.
- Opportunity Owners:** A button labeled 'Add Owners'.
- Notes:** A large empty text area.
- Opportunity Name:** A text input field containing 'New Opportunity'.
- Opportunity Type:** A dropdown menu with 'Contract'.
- Next Step Date:** An empty text input field.
- Commitment:** An empty text input field.

Opportunity Management

All notes, activities, and financials related to the new opportunity are logged and tracked.

VIONTÉ myDashboard Jobs Talent Timesheet **Companies** Documents Back Office Analyze Sub Vendors Automation

Search Add New Company Add New Contact

Ryan Cochran
5438186 CONTACT
No Status

Kate Cochran
Sep 20, 2019

Social Profiles
No social networks defined.
LinkedIn Search

Contact Information
1234 Basic Lane
St. Paul, MN 55125
United States of America

Text Message Consent:
Response

Activities Jobs Tags

From Date To Date By the User Activity Type

Meeting Scheduled on Monday, August 11, 2025 at 2:15 PM
Entered by: Mike McKerns
Meeting booked. Ryan and I are meeting with his team at their HQ on 8/11

Meeting Scheduled on Monday, August 11, 2025 at 2:15 PM
Entered by: Mike McKerns
Meeting to further qualify inside sales order

Cold Call on Wednesday, June 25, 2025 at 1:30 PM
Entered by: Matthew Begley

Call Completed on Tuesday, May 20, 2025 at 2:15 PM
Entered by: Mike McKerns
Met Ryan at a local networking event. He is the hiring manager for their inside sales team. Typically allows his HR team to meet with him.

Call Completed on Friday, December 16, 2022 at 6:15 AM
Entered by: Matthew Begley
test

Ryan Cochran - Add Activity

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

User: Mike McKerns Activity: Call Completed Email: Calendar: Del:

Date: Jul 1, 2025 Start: 1:00 PM

Related Opportunity:
Inside Sales
None
Inside Sales
Repair Tech
Partner:

Opportunity Details

Stage: New Lead Type: Contract Services

Next Step: Face to face meeting Next Step Date: Aug 11, 2025

Opportunity Financials

Amount: 295000 Commitment: 236000 Percentage: 80

Close Date: Aug 18, 2025

+ Add Activity User

Include additional email recipients

Cancel

Opportunity Management

All notes, activities, and financials related to the new opportunity are logged and tracked.

The screenshot displays the AVIONTÉ CRM interface. The top navigation bar includes links to myDashboard, Jobs, Talent, Timesheet, Companies (active), Documents, Back Office, Analyze, Sub Vendors, and Automation. A search bar is on the right. Below the navigation bar, there are links for Search, Add New Company, and Add New Contact.

The main content area is titled "Inside Sales" with a sub-header "Contract Services". It shows the user "Ryan Cochran @ Apple Empire" and the creation date "May 20 2025". A progress bar at the top right indicates the sales cycle stages: 1. New Lead (active), 2. Qualifying, 3. Solution Presentation, 4. Proposal Review, 5. Deal Won - Signed Contract, and 6. Closed - Lost.

The left sidebar contains three sections:

- Opportunity Overview:** Includes buttons for "Delete Opportunity", "Create Job", and an edit icon. It lists "Opportunity Owners: Mike McKerns", "Opportunity Name: Inside Sales", and "Contact: Ryan Cochran".
- Opportunity Detail:** Includes fields for "Stage: New Lead", "Type: Contract Services", "Partner:", "Next Step: Face to face meeting", and "Next Step Date: Aug 11 2025".
- Opportunity Financials:** Includes fields for "Amount: \$295,000.00", "Commitment: \$0.00", "Percentage: 0", "Close Date: Aug 18 2025", and an "Upload Document" button.

The right sidebar contains two sections:

- Opportunity Notes:** Includes an "Add Note" button. It shows two notes from Mike McKerns dated May 20 2025. The first note says "Looking good for an August close." The second note says "Met Ryan at a local networking event. He is the hiring manager for their inside sales team. Typically allows his HR team to manage the hiring but they ...".
- Opportunity Activities:** Shows two activities from Mike McKerns. The first activity is "Meeting Scheduled on Monday, August 11, 2025 at 2:15 PM" with the entry "Entered by: Mike McKerns Meeting booked. Ryan and I are meeting with his team at their HQ on 8/11". The second activity is "Call Completed on Tuesday, May 20, 2025 at 2:15 PM" with the entry "Entered by: Mike McKerns Met Ryan at a local networking event. He is the hiring manager for their inside sales team. Typically allows his HR team to manage the hiring but they have been strugg...".

Strategy 3 - Leveraging Widgets, Reports & Dashboards

Leveraging Widgets, Reports & Dashboards

Maximize visibility using Widgets, Standard Reports, and Avionte INSIGHTS

The screenshot displays the Avionte dashboard interface. The top navigation bar includes the Avionte logo, a 'myDashboard' tab, and links to Jobs, Talent, Timesheet, Companies, Documents, Analyze, and Automation. A search bar with the placeholder 'Type to search' and a notification badge with the number '12' are also present. Below the navigation bar, the dashboard is divided into three main sections:

- Last 40 Contacted Contacts - Ashley Purdy**: A table with columns for Name, Company, Activity, and Date. It lists three contacts: Catherine Hindle, Stephanie Reed, and Susan Montgomery.
- Opportunities - Ashley Purdy**: A table with columns for Company, Opportunity, Next Step Date, and Stage. It lists one opportunity: ABC Company.
- Sales Stats**: A section showing three metrics: Meetings (0 / 3), New Orders (0 / 12), and Starting (0 / 4), each with a user average.

Name	Company	Activity	Date
Catherine Hindle C.H@Kuakini.com	(Strike)Kuakini Medical Center	Call Returned	7/10/26
Stephanie Reed stmreed@gail.com	ABC Company	Nurture Email (1)	7/1/26
Susan Montgomery s.montgomery@nomail.com	ABC Company	Nurture Email (2)	7/1/26

Company	Opportunity	Next Step Date	Stage
ABC Company Corrie Barry	New Opportunity	Jul 13, 2026	Prospecting

Sales Stats

- 0 / 3 Meetings - User Average: 0.03
- 0 / 12 New Orders - User Average: 0.13
- 0 / 4 Starting - User Average: 0.04

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Sales Stats Report						
WeekEnding , NewOrder , Ca Saved Filters						
WeekEnding	NewOrder	Call Completed	Meeting Completed	Meeting Scheduled	Client Visit	Email Sent
2025-04-05	14	1	2	1	3	0
2025-04-12	13	3	3	0	0	0
2025-04-19	5	0	0	3	0	0
2025-04-26	16	0	0	0	0	1
2025-05-03	10	2	0	0	1	0
2025-05-10	11	2	0	0	2	0
2025-05-17	18	1	0	0	0	0
2025-05-24	9	2	3	0	0	0
2025-05-31	17	337	0	1	0	0
2025-06-07	11	0	0	0	0	4
2025-06-14	4	39	0	1	1	0
2025-06-21	6	0	1	2	0	1
2025-06-28	9	1	0	2	0	0
2025-07-05	4	2	2	1	1	0

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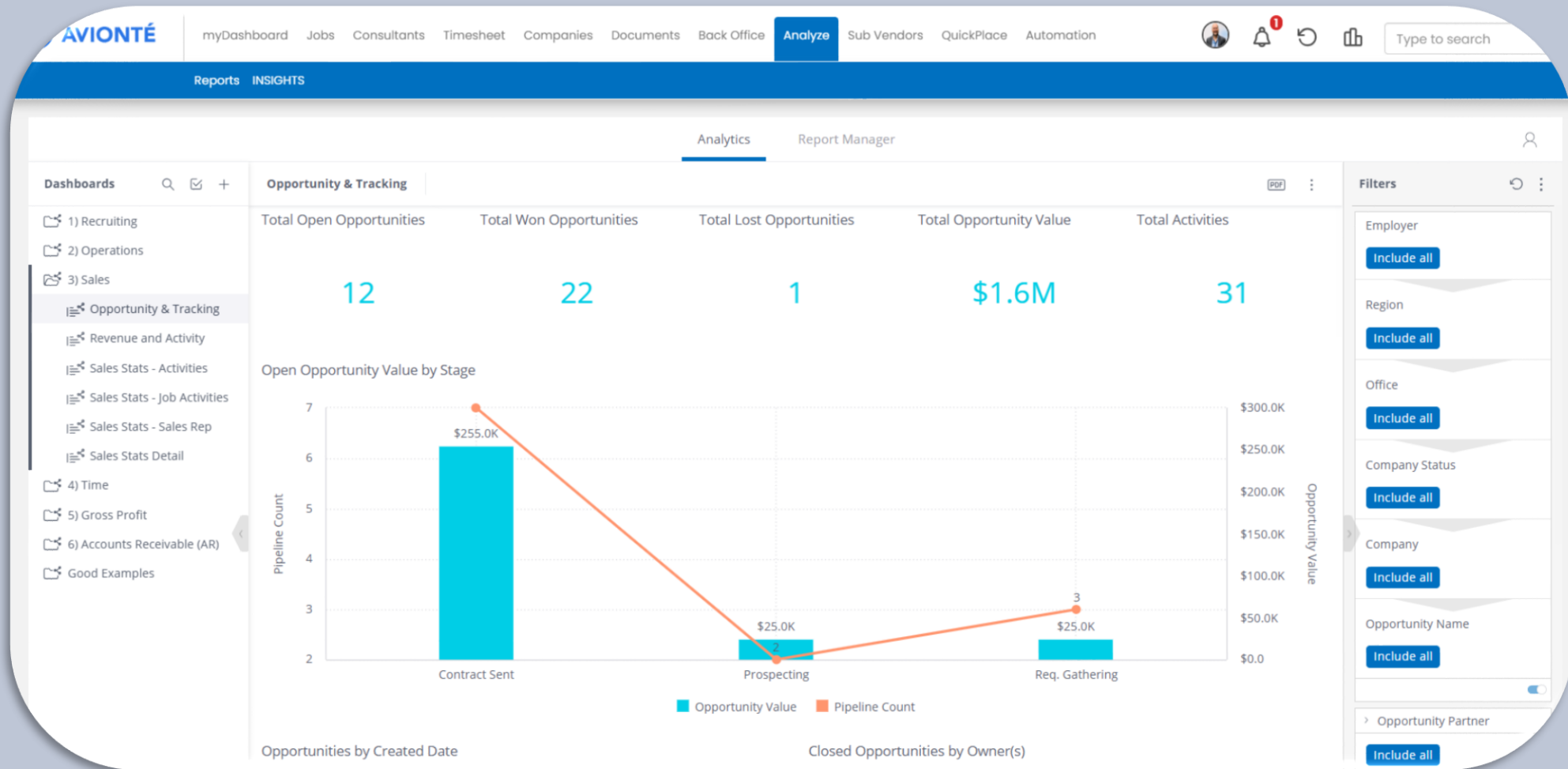
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Sales Activity Report							Activity Date , User , Compar	Saved Filters			
Activity Date	Type of Activity	User	Company Name	Company Contact	Contact Title	Activity Notes					
Jun 30, 2025 5:15:00 PM	Meeting Completed	David Webb	Avenir	Kristi Faltorusso		Entered by: David Webb					
Jun 30, 2025 4:15:00 PM	Meeting Completed	David Webb	Avionte	Sara Cavandoli		Entered by: David Webb Sara said email her doc					
May 21, 2025 3:15:00 PM	Meeting Completed	David Webb	Avenir	Sean Semo		Entered by: David Webb need to send contract					
May 20, 2025 10:15:00 AM	Meeting Completed	David Webb	Avenir	Mike Stickley	Warehouse Foreman	Entered by: David Webb need to send SOW					
May 19, 2025 2:15:00 PM	Meeting Completed	David Webb	Avenir	Mike Stickley	Warehouse Foreman	Entered by: David Webb need to send contract					
Apr 3, 2025 1:30:00 PM	Meeting Completed	David Webb	Avenir	Barry Bonds	Sales Engineer	Entered by: David Webb					
Mar 31, 2025 2:15:00 PM	Meeting Completed	David Webb	Avenir	Mike Stickley	Warehouse Foreman	Entered by: David Webb					
Mar 4, 2025 11:30:00 AM	Meeting Completed	David Webb	Avenir	Mike Stickley	Warehouse Foreman	Entered by: David Webb Type bites here					
Feb 7, 2025 12:00:00 PM	Meeting Completed	David Webb	Flow Warehouse	David Webb	Sales Engineer	Entered by: David Webb					
Feb 4, 2025 12:45:00 PM	Meeting Completed	David Webb	Avenir	Barry Bonds	Sales Engineer	Entered by: David Webb notes go here					
Jan 23, 2025 1:15:00 PM	Meeting Completed	David Webb	Apple	Kendall Haefner	Recruiting Coordinator	Entered by: David Webb					

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Adoption Process

Mastering Opportunity Workflows



Day 1-30

Foundation



Day 31-60

Implementation



Day 61-90

Optimization

Days 1-30: Foundation

Identify key data points for opportunity tracking & initial data cleanup.

Map out core sales workflows (lead to opportunity, opportunity stage progression).

Define 1-2 initial Nurture Sequences.

Familiarize admin team with relevant Widgets and INSIGHTS dashboards.

Days 31-60: Implementation

Training

Train team new process.

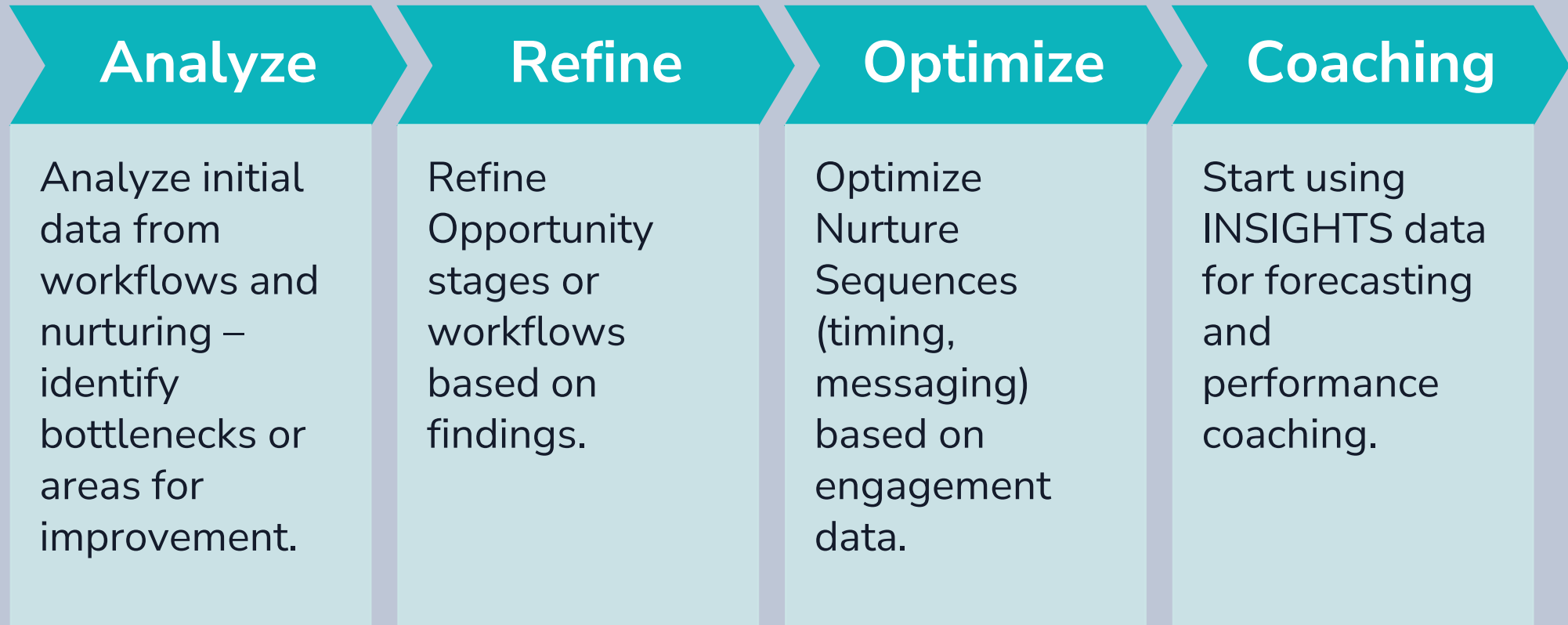
Mandate

Mandate all new opportunities are entered and managed via the defined workflow in Avionté.

Begin

Begin actively using key widgets/dashboards in team meetings for pipeline review.

Days 61-90 Optimization



Questions?

Session Resources

Resource	Session Topic	Link
Creating Email Templates	Strategy 1	Create Email Templates (Utilities)
Creating and using Contact Activities	Strategy 1	Create and use Contact Activities
Mass Emailing Contacts	Strategy 1	Mass Emailing Contacts
Company and Contact Search	Strategy 1	Company and Contact Search
Create and Use Opportunities	Strategy 2	Create and use Opportunities
Opportunity and Tracking (INSIGHTS)	Strategy 2	Opportunity and Tracking (INSIGHTS)
Setting up Pipeline Stages	Strategy 2	Set up Pipeline Stages
Enhanced Analyze Reports	Strategy 3	Enhanced Analyze Reports
Opportunities Report	Strategy 3	Opportunities Report
Sales Stats Report – BOLD Analyze	Strategy 3	Sales Stats Report
Sales Activity Report – BOLD Analyze	Strategy 3	Sales Activities Report

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