Increasing Productivity of your Sales Staff

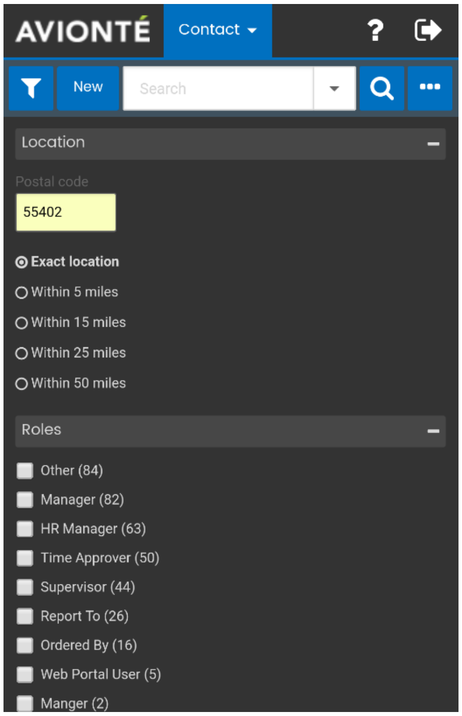
Core Application

Key take-aways for the core application

- Create New Customers and modify the New Customer Wizard in Admin Tools > Wizard
- Log messages tracking your progress with clients and create tasks from those messages
- Add additional Contact Role drop down options in Admin Tools > Config Choice
- Track your Level of Interest, Marketing Info, and Lead Sources in Customer > Sales & Service
- Use Customer > Revenue Opportunity to create forecasts and pipeline to plan ahead for potential orders
- Edit these Sales & Service Config Choice options
    - CustomerSalesLevel
    - CustomerIndustryCode
    - CustomerType
    - CustomerLeadSource
- Edit these Revenue Opportunity Config Choice options
    - RevenueStatus
    - RevenuePeriod
    - SalesCloseLevel
- Use the Calendar & Task functionality and add recurring items
- Reports to use to track information entered into your system
    - Staffing Action Report: Track/Review user activity
    - Revenue Opportunity Report: Track/Review sales pipeline
    - Gross Profit Report: Track/Review company and sales performance. This report can also be used for bonus and commission calculations
    - Gross Profit and Hours Comparison Report: Track/Review company performance between 2 different periods of time

Recruiter Module

Key take-aways for the Recruiter Module



- Searching Tips
    - AND, OR, and NOT for added search precision
    - Use : (colon) as first character in the search field to generate a searchable list of specific Aero elements
    - Use * (asterisk) after a search fragment to produce elements that begin with the characters already typed
    - Aero Search – General article in Knowledge Base for further comprehensive explanation of search tips
- Company
    - Filter by branch, status, and location
    - View additional information relating to customer without clicking into that customer
- Order
    - Filter by branch and status
    - Able to see candidate information, salary and fees, general information, and job description
- Talent
    - Filter by branch, status, location, and competencies
    - Easy candidate searching while onsite with a client
    - Can type the employee name or experience/job experience in search engine
- Contact
    - Filter by branch, status, location, and roles
    - Easy contact searching to see other clients in the area to visit
    - Able to add additional contacts on the spot and link to customers (Optional)
- Messages
    - Log messages while on the go
    - Add messages under contacts and customers
    - Message Type = Action Type
- Anything that is entered into the Recruiter Module flows into the Core Application automatically
- The ability to add new customers will be available at the end of summer!!!! ☺