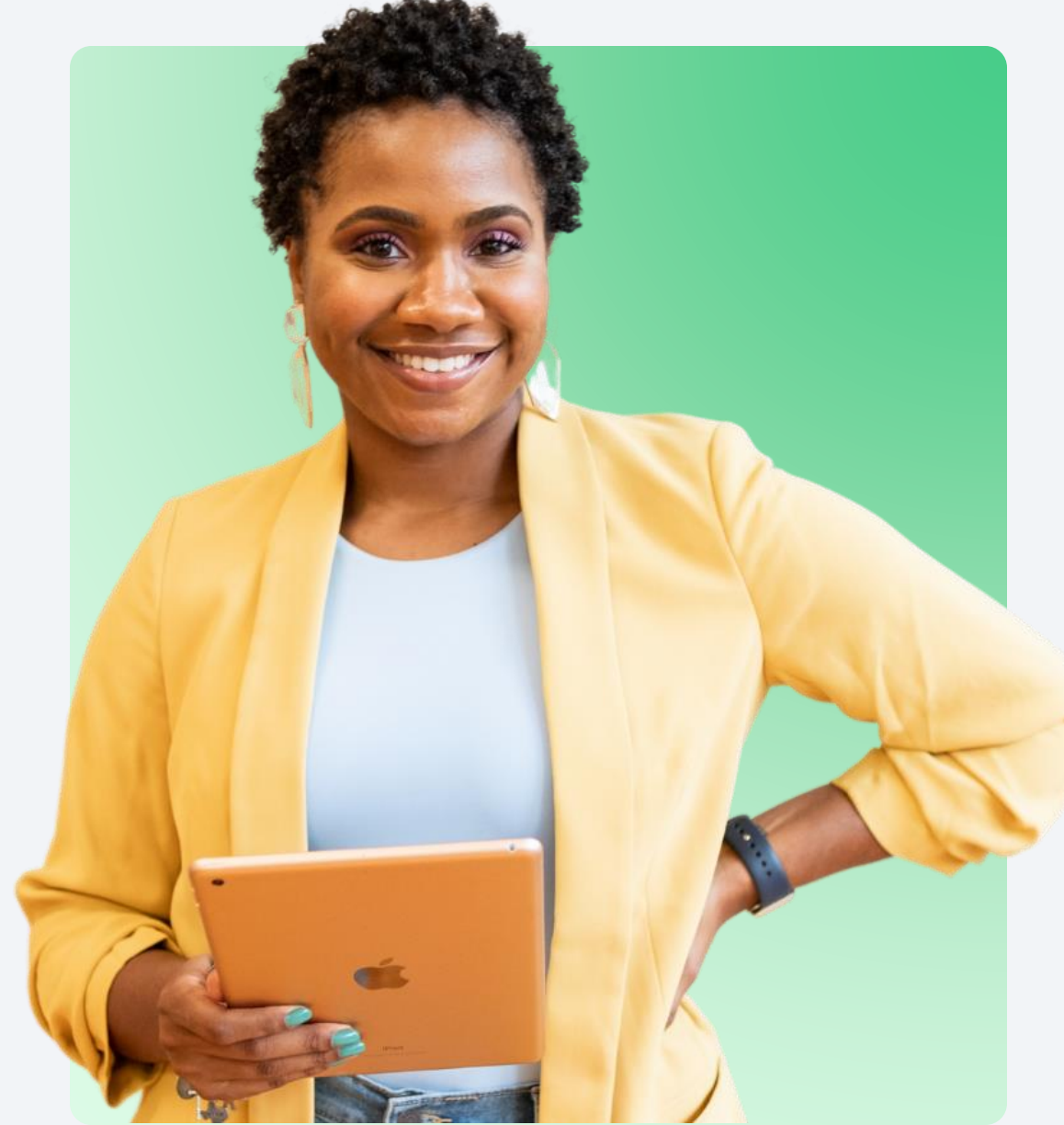


AVIONTÉ
CONNECT

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

SALES & REVENUE



FRONT OFFICE

BACK OFFICE

MOBILE

AI & AUTOMATION

VMS

INTEGRATIONS

ANALYTICS

Turning Your CRM into a Growth Engine

Maximize What You Already Have

- 1 Introductions
- 2 Current State
- 3 Three Strategies
- 4 Adoption Plan
- 5 Next Steps & Call to Action
- 6 Q&A

Introductions

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



Mike McKerns

ACCOUNT EXECUTIVE

SALES



Pearce Olson

DIRECTOR OF CUSTOMER SOLUTIONS

SUCCESS



Why are we here?

Transform your CRM from a database into a revenue engine.

BY THE END OF THE SESSION

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

State of Industry



2025

Sales are down across the board for 2025



2026

ASA is predicting growth will resume in 2026 with industry revenue 3%

Typical Avionté Client - Key Pain Points



Large number of Companies and
Contact Records



Sales Reps running basic
Searches - Quick Search



No defined sales process.
Measuring only activities

Agencies that will grow

- 1 Data-Driven Culture & Decision Making
- 2 Lean on technology
- 3 Maintain a client centric approach
- 4 Well-defined sales process
- 5 Focus on effective execution

Data

- Is your database accurate and current?
 - Contacted in the last 3 years
 - Order placed within 12 months
 - Company status accurate?
- Can a sales rep easily determine what they are responsible for?
 - Territory or Vertical
- Quality not Quantity

Lean on Tech

- ✓ Sales rep should be using Avionte throughout the day

- ✓ Mandate workflow adherence

- ✓ Conduct regular pipeline reviews using Avionté data *only*

- ✓ Ensure data hygiene for opportunities and activities

- ✓ Celebrate early wins based on the new structure.



Elevation Strategy

- 1 Driving Conversion – Strategic Nurturing & Engagement
- 2 Structuring for Predictability – Mastering Opportunity Workflows
- 3 Maximizing Visibility – Leveraging Widgets & Analytics



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Building Your Assets and Setting a Cadence



Day 1

Initial Email.

Focus on industry updates, educational content, and adding value.



Day 3

Call 1.

Script this out and be intentional with a clear goal in mind like scheduling a meeting.



Day 5

Email 2.

Build on the initial email and include a call to action. Consider using a calendar link for ease of scheduling



Day 7

Linked In.

Connect on LI (if not already connected) and re-share your msg and request for a meeting.



Day 9

Call 2.

Script this out and be intentional with a clear goal in mind like scheduling a meeting.



Day 11

Email 3.

Share a client success story. Reiterate how you're able to add value and include a call to action.

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.

The screenshot shows the 'Email Templates' management page in the AVIONTÉ system. The navigation bar includes 'myDashboard', 'Jobs', 'Talent', 'Timesheet', 'Companies' (selected), 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. Below the navigation bar are links for 'Search', 'Add New Company', and 'Add New Contact'. The main content area is titled 'Email Templates' with a breadcrumb 'Utilities > Email Templates'. A search bar labeled 'Search for Templates' is at the top. Below it is a 'My Templates' section with a '+ Create New' button and a table of three templates. Each template has 'Edit', 'Delete', and 'Share' icons. A 'Shared Templates' section at the bottom lists two templates with 'View' and 'Share' icons.

Template Name	Edit	Delete	Share
MN prospects, Sales Outreach - Email 1			
MN prospects, Sales Outreach - Email 2			
MN prospects, Sales Outreach - Email 3			

Template Name	View	Share
Candidate Nomination Email		
Candidate Prescreen		

The screenshot shows the 'Email Templates' editing page in the AVIONTÉ system. The navigation bar is identical to the previous screenshot. The main content area is titled 'Email Templates' with a breadcrumb 'Utilities > Email Templates'. It features a 'Title' field with the value 'MN prospects, Sales Outreach - Email 1' and a 'Subject' field with the value 'Unlock Greater Efficiency & Savings in MN Manufacturing'. Below these fields is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, font family, font size, bulleted list, numbered list, link, unlink, image, table, undo, redo, link, unlink, and help. The editor content includes a paragraph about manufacturing efficiency, a bulleted list of benefits, and a closing paragraph with a call to action. A 'Save Defaults' and 'View Defaults' link is located above the editor. The bottom right corner shows a small '0' in a box.

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 shows the AVIONTE CRM interface. At the top, there is a navigation bar with the AVIONTE logo and various menu items: myDashboard, Jobs, Talent, Timesheet, Companies (highlighted), Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. Below this is a secondary navigation bar with 'Search', 'Add New Company', and 'Add New Contact'. The main content area features a search configuration panel. On the left, under 'Activities', there are dropdown menus for 'Show me', 'Contacts Who Have Had', 'Call Completed', and 'Anyone'. There is also a checkbox for 'Include Inactive Users' and input fields for 'From Date' and 'To Date'. An 'Add' button is at the bottom of this section. In the center, a 'New Tag Preview (Not applied):' box shows two search criteria: '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 this preview. On the right, a 'Saved Searches' dropdown menu is open, listing several search names: 'Dormant - Hospitality Accounts' (highlighted), 'MN Prospects', 'Expiring Company Docs', 'Dormant Account Outreach', 'Prospect List', and 'Manage Saved Searches'. Below the dropdown, a table of search results is visible, with columns for industry, date, and user name.

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 AVIONTÉ CRM interface. The top navigation bar includes 'myDashboard', 'Jobs', 'Talent', 'Timesheet', 'Companies', 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. The 'Companies' tab is active. Below the navigation, there are buttons for 'Search', 'Add New Company', and 'Add New Contact'. A search filter shows 'Selected Industries: Hospitality' and 'Activities (1)'. The main content area is split into two panels. The left panel, titled 'CRM Search Results', contains a table with columns for Company, Last Contacted, First Name, Last Name, and Title. The right panel, titled '17 Contacts - Add Task', contains configuration options for an activity, including Event Color, Time Zone, User, Activity, Date, Start, End, Email, Calendar, and Del. A green button labeled '+ Add Activity User' is visible, along with a checkbox for 'Include additional email recipients' and an 'Email Subject' field.

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

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

The screenshot displays the AVIONTE myDashboard interface. At the top, there is a navigation bar with the AVIONTE logo and various menu items: myDashboard, Jobs, Talent, Timesheet, Companies, Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. A search bar is located on the right side of the navigation bar.

Below the navigation bar, there is a sub-navigation bar with tabs for Opportunities, Talent, Contact Tasks (selected), and Hot List. The main content area is titled 'CONTACT TASKS - AT A GLANCE' and features a summary of tasks across different time periods:

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

Below the summary, there are buttons for 'View Shared Tasks', 'Share Your Tasks', and a search field. The main content area is a table of tasks with the following columns: Date, Name, Company Name, Title, Phone, Owner, Assigned By, Activity Type, and Action.

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 Executive Mobile: 610.864.7516 Email: 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 Executive Mobile: 610.864.7516 Email: 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 Executive Mobile: 610.864.7516 Email: 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 Executive Mobile: 610.864.7516 Email: 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 Executive Mobile: 610.864.7516 Email: 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 AVIONTE CRM interface. At the top, the navigation bar includes 'myDashboard', 'Jobs', 'Talent', 'Timesheet', 'Companies', 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. The 'Companies' tab is active. Below the navigation bar, there are buttons for 'Search', 'Add New Company', and 'Add New'. A filter bar shows 'CRM Terms', 'Selected Industries: Hospitality', and 'Activities (1)'. The main content area is titled 'CRM Search Results' and contains a table with the following data:

Company	Last Contacted	First Name
AppleBees	Jul 1, 2025 3:00...	Jerry
Charlotte Mot...	Jul 1, 2025 3:00...	Greg
Charlotte Mot...	Jul 1, 2025 3:00...	Garrett
Charlotte Mot...	Jul 1, 2025 3:00...	Thomas
Chick-Fil-A	Jul 1, 2025 3:00...	John
Chick-Fil-A	Jul 1, 2025 3:00...	Tim
Chick-Fil-A	Jul 1, 2025 3:00...	John
Chick-Fil-A	Jul 1, 2025 3:00...	John
Chick-Fil-A	Jul 1, 2025 3:00...	Carla

At the bottom of the table, it says 'Total Items: 17 (Selected Items: 17)'. A modal window titled 'Send an email to 17 contacts' is open over the table. The modal contains the following information:

- Recipient list: 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: A rich text editor with a toolbar and a dropdown menu of templates.

The template dropdown menu is open, showing the following options:

- 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

At the bottom of the modal, there are 'Cancel' and 'Send Email' buttons.

Driving Conversion

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

- Step 6 – Complete the Tasks then Rinse and Repeat

The screenshot shows the Avionté 'myDashboard' interface. The top navigation bar includes 'myDashboard', 'Jobs', 'Talent', 'Timesheet', 'Companies', 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. Below this, there are tabs for 'Dashboard' and 'Tasks'. The 'Contact Tasks' section is active, showing a summary of tasks and a list of individual tasks.

CONTACT TASKS - AT A GLANCE

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

Buttons: View Shared Tasks, Share Your Tasks, Search

<input checked="" type="checkbox"/>	Date	Name	Company Na...	Title	Phone	Owner	Assigned By	Activity Type	Action
<input checked="" type="checkbox"/>	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 Executive Mobile: 610.864.7516 Email: mike.mckerns@avionte.com									
<input checked="" type="checkbox"/>	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 Executive Mobile: 610.864.7516 Email: mike.mckerns@avionte.com									
<input checked="" type="checkbox"/>	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

Buttons: Complete Selected Tasks, Delete Selected Tasks

Driving Conversion

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

- Step 6a – Complete the Tasks then Rinse and Repeat

The screenshot displays the AVIONTÉ myDashboard 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'. A search bar is located on the right. Below the navigation, the 'Contact Tasks' section is active, showing a 'CONTACT TASKS - AT A GLANCE' summary with statistics for Today & Past Due (17), This Week (37), Next Week (51), This Month (91), This Quarter (91), and All Tasks (91). Below the summary are buttons for 'View Shared Tasks' and 'Share Your Tasks', along with a search input. The main area contains a table of tasks with columns for Date, Name, Company Name, Title, Phone, Owner, Assigned By, Activity Type, and Action. The table lists six tasks, all marked as 'Completed'. At the bottom, there are buttons for 'Complete Selected Tasks' and 'Delete Selected 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	800-455-2144	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

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. On the left, a 'CRM Search Results' table is visible, showing a list of contacts with columns for Company, Preview, Last Contact, First Name, and Last Name. The contact 'Greg Walter' is highlighted. On the right, the 'Contact' profile for 'Greg Walter' is open, showing an 'Add Activity' form. The form includes fields for User (Mike McKerns), Activity (Call Completed), Email, Calendar, Date (Jul 1, 2025), and Start (12:00 PM). Below the form is a rich text editor with a toolbar and a text area containing the note: '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.'

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

Activities

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

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 AVIONTÉ dashboard's 'Contact Tasks' section. At the top, there's a navigation bar with 'myDashboard' and various menu items like 'Jobs', 'Consultants', 'Timesheet', etc. Below this, a 'CONTACT TASKS - AT A GLANCE' summary shows task counts for different periods: Today & Past Due (17), This Week (37), Next Week (51), This Month (91), This Quarter (91), and All Tasks (91). A table below lists individual tasks with columns for Date, Name, Company Name, Title, Phone, Owner, Assigned By, Activity Type, and Action. All tasks in the list are marked as 'Completed'. At the bottom of the table, there are two buttons: 'Complete Selected Tasks' (highlighted with a red arrow) and 'Delete Selected Tasks'.

<input checked="" type="checkbox"/>	Date	Name	Company Name	Title	Phone	Owner	Assigned By	Activity Type	Action
<input checked="" type="checkbox"/>	Aug 13 2025 11:45AM	Jerry Smith	AppleBees	Director of Operations		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Aug 13 2025 11:45AM	Carla Cahill	Chick-Fil-A	Customer Experience Director		Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete
<input checked="" type="checkbox"/>	Aug 13 2025 11:45AM	Kim Hermes	Chick-Fil-A	Operations Manager	9892238893	Mike McKerns	Mike McKerns	Call Scheduled	Completed Reschedule Both Delete



Elevation Strategy

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Structuring for Predictability: Mastering Opportunity Workflows



New Lead

Regardless of where it came from, the potential for new business has been identified.



Qualifying

Does the prospect have authority, budget, and clear timeline. Are the positions in your wheelhouse?



Solution Presentation

The prospective client has a clear need for your services and now it's time to share the best way to partner (anything from contingent search to MSP or RPO)



Proposal Review

Rates, terms and conditions are shared, and both parties work toward alignment.



Closed (W/L)

Whether the opportunity is won or lost, share as much detail as possible for continuous improvement.

Opp Management

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

The screenshot displays the AVIONTÉ CRM interface. On the left is the contact profile for Ryan Cochran, including a silhouette, name, phone number (5438118), and status (No Status). The main area shows a list of activities for Ryan Cochran, such as 'Meeting Scheduled' and 'Call Completed'. On the right, the 'Add Activity' modal is open, showing fields for Time Zone, User, Activity, Date, Start, Opportunity Details, Opportunity Financials, and a 'Related Opportunity' dropdown menu. The 'Related Opportunity' dropdown is circled in red, showing 'Inside Sales' as the selected option.

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

Search Add New Company Add New Contact

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

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

Opp Management

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

The screenshot displays the AVIONTÉ CRM interface. At the top, a navigation bar includes the AVIONTÉ logo and various menu items: myDashboard, Jobs, Talent, Timesheet, Companies (highlighted), Documents, Back Office, Analyze, Sub Vendors, and Automation. A search bar on the right contains the text 'Type to search'. Below the navigation bar, a secondary bar offers 'Search', 'Add New Company', and 'Add New Contact' options.

The main content area is titled 'Inside Sales Contract Services' and is associated with 'Ryan Cochran @ Apple Empire', created on May 20, 2025. A progress bar at the top right shows 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 interface is divided into several sections:

- Opportunity Overview:** Includes 'Delete Opportunity', 'Create Job', and an edit icon. It lists 'Opportunity Owners' (Mike McKerns), 'Opportunity Name' (Inside Sales), and 'Contact' (Ryan Cochran).
- Opportunity Detail:** Lists 'Stage' (New Lead), 'Type' (Contract Services), and 'Partner'. It also shows 'Next Step' (Face to face meeting) and 'Next Step Date' (Aug 11 2025).
- Opportunity Financials:** Shows 'Amount' (\$295,000.00), 'Commitment' (\$0.00), and 'Percentage' (0). The 'Close Date' is Aug 18 2025.
- Opportunity Documents:** Features an 'Upload Document' button.
- Opportunity Notes:** Contains two notes from Mike McKerns dated May 20, 2025. The first note says 'Looking good for an August close.' The second note describes meeting Ryan at a networking event.
- Opportunity Activities:** Lists two activities: 'Meeting Scheduled' on Monday, August 11, 2025 at 2:15 PM, and 'Call Completed' on Tuesday, May 20, 2025 at 2:15 PM.



Elevation Strategy

- 1 Driving Conversion – Strategic Nurturing & Engagement
- 2 Structuring for Predictability – Mastering Opportunity Workflows
- 3 Maximizing Visibility – Leveraging Widgets & Analytics

Visibility

Maximize visibility using Widgets, Standard Reports, and Avionte INSIGHTS.

The screenshot displays the Avionte dashboard interface. At the top, the navigation bar includes the Avionte logo, a 'myDashboard' dropdown, and various menu items like Jobs, Talent, Timesheet, Companies, Documents, Back Office, Analyze, Sub Vendors, QuickPlace, and Automation. On the right, there are user profile icons, a notification bell with a red '1', a refresh icon, a grid icon, and a search bar labeled 'Type to search'.

The dashboard features three main widgets:

- New Job Orders:** A pie chart titled 'Second Qtr This Year (154)' showing the distribution of orders by user. The data is as follows:

User	Count	Percentage
Nick Rayman	54	35.1%
Clare Sodeling	28	18.2%
David Webb	27	17.5%
Kirsty Russell	6	3.9%
Tim Ubinger	5	3.2%
Erik elm	5	3.2%
Dyamond Lawson	7	4.5%
Jay Fitzmaurice	2	1.3%
Edward Lavoire	2	1.3%
Angela Boike	1	0.6%
- Sales Stats:** A list of metrics showing progress against user averages:

Metric	Current	Target	User Average
Meetings	3 / 16	16	0.15
New Orders	0 / 192	192	1.76
Placed	0 / 92	92	0.84
Status - Active	11 / 135	135	-
Lost	0 / 3	3	0.03
Cancelled by WorkN	0 / 1	1	0.01
- Opportunities - Mike McKerns:** A table listing various job opportunities with their respective companies, stages, and next steps.

Company	Opportunity	Next Step Date	Stage
Caterpillar William Ainsworth	CNC Operator	Jun 2, 2023	Needs Analysis
Fublix Eric Henderson	Picker Packer	May 29, 2023	Needs Analysis
Chick-Fil-A Kim Hermes	Cashier	Aug 30, 2023	Req. Gathering
Smith Family Estate John Smith	Estate Manager	Feb 10, 2023	Qualify
AT&T Center Elizabeth Bennis	Customer Service	May 31, 2023	Negotiating & Review
Ballard Spahr Sha Gant	[Ballard Spahr] Entry Level Paralegal	Sep 18, 2023	Contract Sent

Visibility

Maximize visibility using Widgets, Standard Reports, and Avionte INSIGHTS.

The screenshot displays the Avionte dashboard interface. At the top, the Avionte logo is on the left, and a navigation menu includes 'myDashboard', 'Jobs', 'Talent', 'Timesheet', 'Companies', 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. On the right, there are user profile icons, a notification bell with a red '1', a refresh icon, a bar chart icon, and a search bar labeled 'Type to search'. Below the navigation is a blue header bar with 'Reports' and 'INSIGHTS' tabs. The main content area features a 'Sales Stats Report' table with columns for 'WeekEnding', 'NewOrder', 'Call Completed', 'Meeting Completed', 'Meeting Scheduled', 'Client Visit', and 'Email Sent'. The table contains 14 rows of data. In the top right of the report area, there are filter controls: 'WeekEnding , NewOrder , Ca', 'Saved Filters', and a filter icon.

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

Visibility

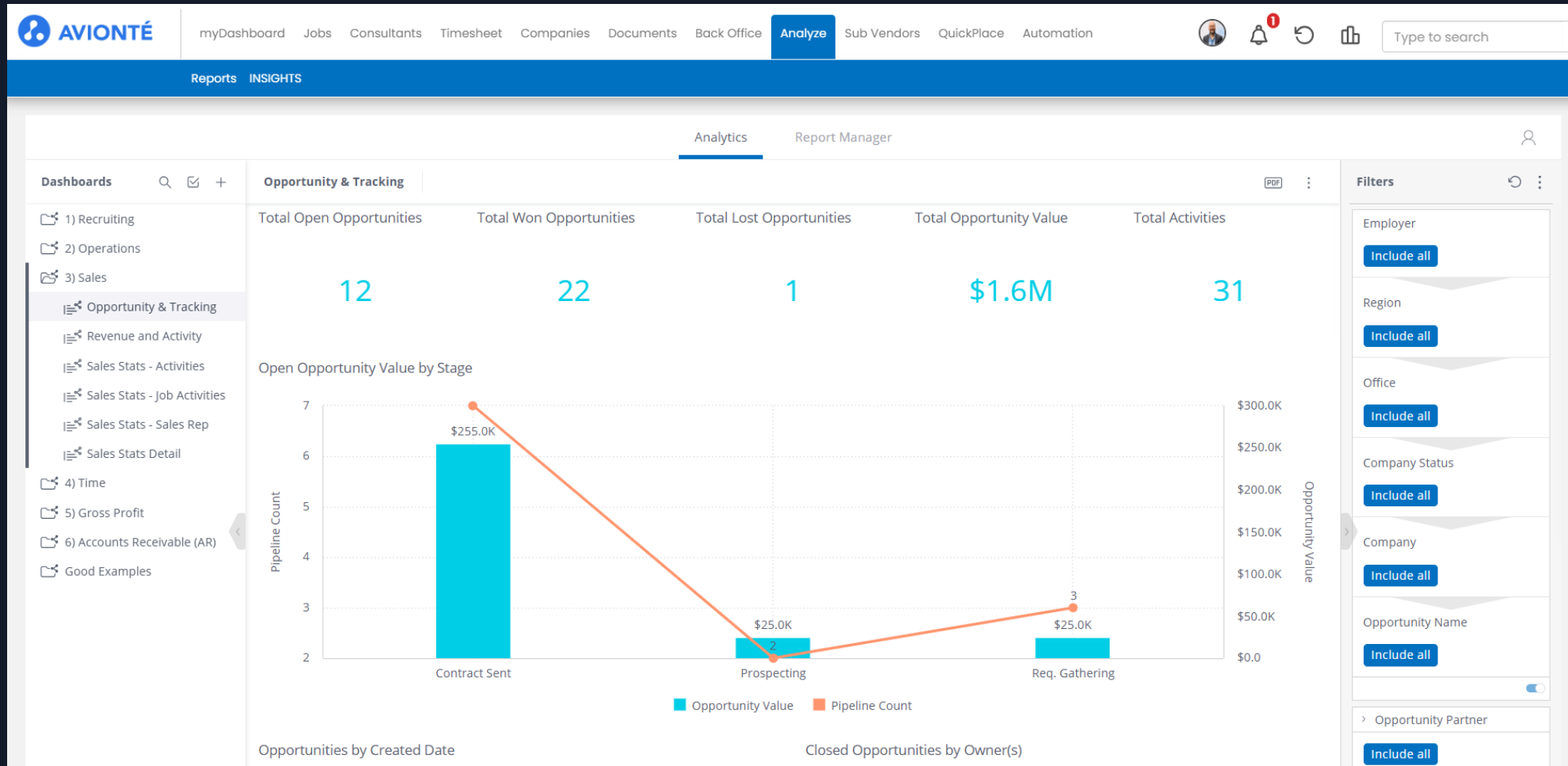
Maximize visibility using Widgets, Standard Reports, and Avionte INSIGHTS.

The screenshot displays the Avionte web application interface. At the top left is the Avionte logo. The navigation menu includes: myDashboard, Jobs, Talent, Timesheet, Companies, Documents, Back Office, **Analyze** (highlighted), Sub Vendors, QuickPlace, and Automation. On the right side of the navigation bar, there is a user profile icon, a notification bell with a red '1', a refresh icon, a share icon, and a search bar with the placeholder text 'Type to search'. Below the navigation bar is a blue header with 'Reports' and 'INSIGHTS'. The main content area is titled 'Sales Activity Report' and features a table with the following columns: Activity Date, Type of Activity, User, Company Name, Company Contact, Contact Title, and Activity Notes. The table contains 12 rows of data, all with the 'Type of Activity' set to 'Meeting Completed'. The 'Activity Notes' column contains various entries such as 'Entered by: David Webb' and 'need to send contract'. At the top right of the table, there are controls for 'Activity Date, User, Compar', 'Saved Filters', and a filter icon.

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

Visibility

Maximize visibility using Widgets, Standard Reports, and Avionte INSIGHTS.





Adoption **Process**

1 Foundation

2 Implementation

3 Optimization

Days 1-30: Foundation



Finalize and configure Opportunity stages/fields in Avionté.



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



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

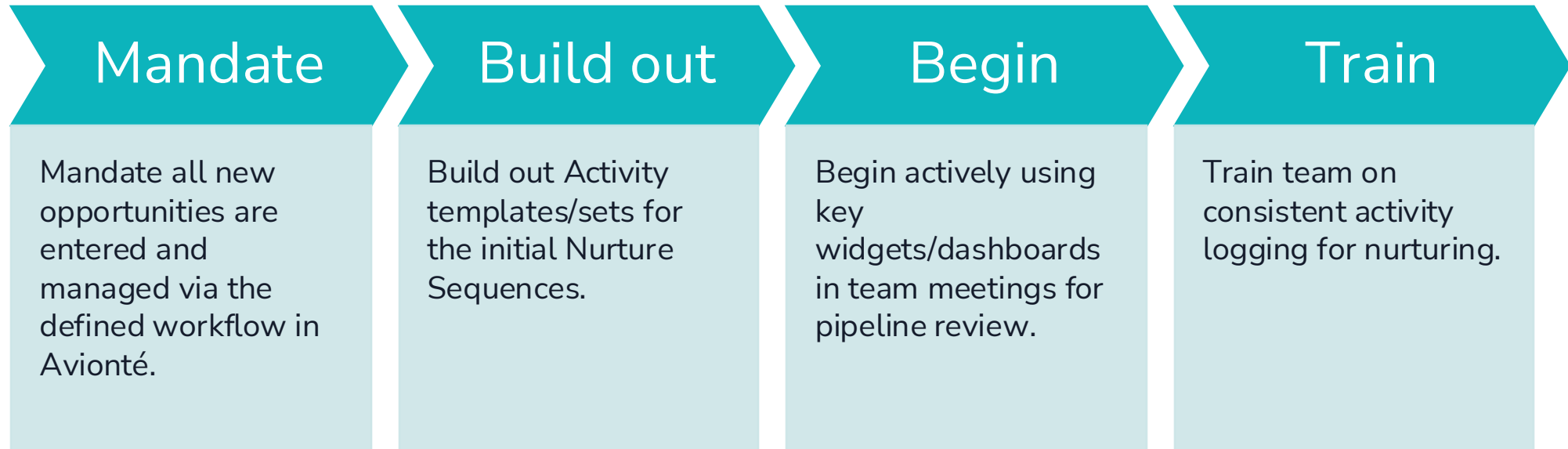


Familiarize team with relevant Widgets and INSIGHTS dashboards.

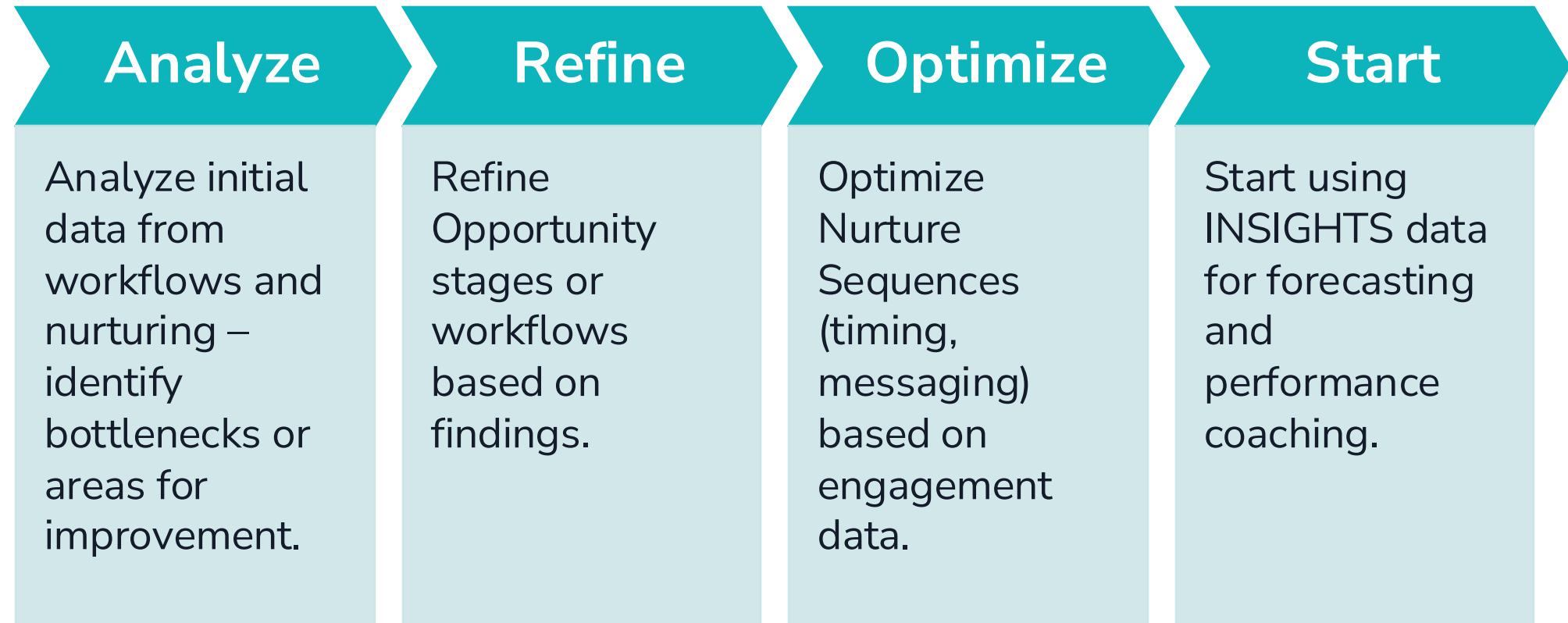


Define 1-2 initial Nurture Sequences on paper.

Days 31-60: Implementation



Days 61-90 Optimization



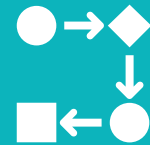
Recap



Current State of the Industry



CRM Elevation Strategy



Putting it into action



Next steps and Questions

Rate the session



Leave further feedback...

SEND

Cancel

Thank You

Help shape future **CONNECT** content by rating this session.

1. Open the Bizzabo app and select Agenda
2. Locate **Turning Your CRM into a Growth Engine: Maximize What You Already Have.**
3. Rate and leave feedback



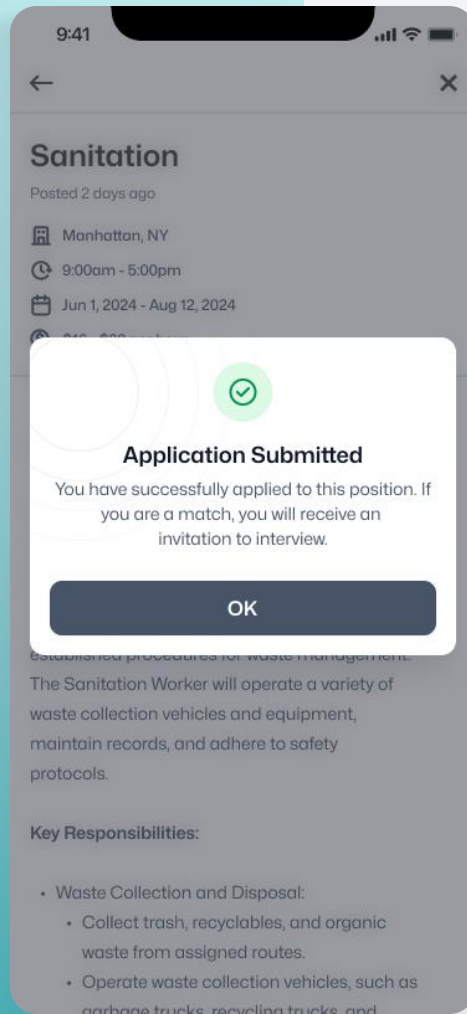
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- Leave with strategies you can implement now

DesignLab

Step into the future of staffing technology. Preview upcoming innovations, share your feedback, and help shape what comes next.

The screenshot displays the AVIONTE Back Office interface. The top navigation bar includes the AVIONTE logo, a search bar, and various menu items: myDashboard, Jobs, Talent, Timesheet, Companies, Documents, Back Office (highlighted), Analyze, Sub Vendors, QuickPlace, and Automation. On the right side of the navigation bar are icons for search, notifications, chat, settings, and a user profile.

The main content area is titled "Payment Batch ID: 10513". Below the title are several action buttons: "Select Transactions", "Process", "Print Checks", "Post", "Discard Batch", "View Paychecks", and "Email Paychecks".

The "Payment Batch Summary" section provides the following details:

Check Count	0	Transaction Count	5
Batch ID	10513	Description	
Status	Processed	Check Date	08/08/25
Batch Type	Check Run	Created By	avi.next1
Accounting Period Date	08/03/25	Bank ID	1
Bank Name	Bank of Avionte	Bank Description	Bank of Avionte
ACH Generated Date		Generate Original Pay Units	No

The "Transactions" section contains a table with the following data:

Talent Name	SSN	Company Name ↓	Department Name	Total Pay	Total Bill
Ethan Campbell	XXX-XX-XXXX	Williamson & Harris Co.	Corporate	\$1000.00	\$1250.00
Orlando Diggs	XXX-XX-XXXX	Pinnacle Solutions	Accounting	\$600.00	\$750.00
Demi Wilkinson	XXX-XX-XXXX	FedExpress	Corporate	\$640.00	\$800.00
Kate Morrison	XXX-XX-XXXX	Coca Cola	Corporate	\$800.00	\$1000.00

The left sidebar contains a search bar and a list of menu items: Time Entry, Payroll, Search (highlighted), Transactions, Checks, Billing, Invoice, Paycheck, Accounts Receivable, Weekly Process, Import / Export, Unemployment Claims, and WC Claims.