improve it 360
an EverCommerce Solution

IMPROVEIT 360 TRAINING PROGRAM

Welcome to improveit 360's Training Program

Our comprehensive training program was designed to give you and your team the knowledge and skills necessary to succeed with improveit 360. The training curriculum covers all aspects of the improveit CRM platform, from Lead Entry through Project Completion, as well as Reports and System Administrator functions. The training material is broken down into 9 total web-based 'learning tracks.' Below you will find additional information on what to expect throughout the training process, depending on if you're a new or existing customer.

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NEW CUSTOMERS

How do we get started?

Start by scheduling your Training Introduction (1 hr) session. During this session, an instructor will walk you through the Onboarding Checklist and the Learning Management System (LMS), as well as ensure you have login access to the LMS and your company's new improveit 360 system.
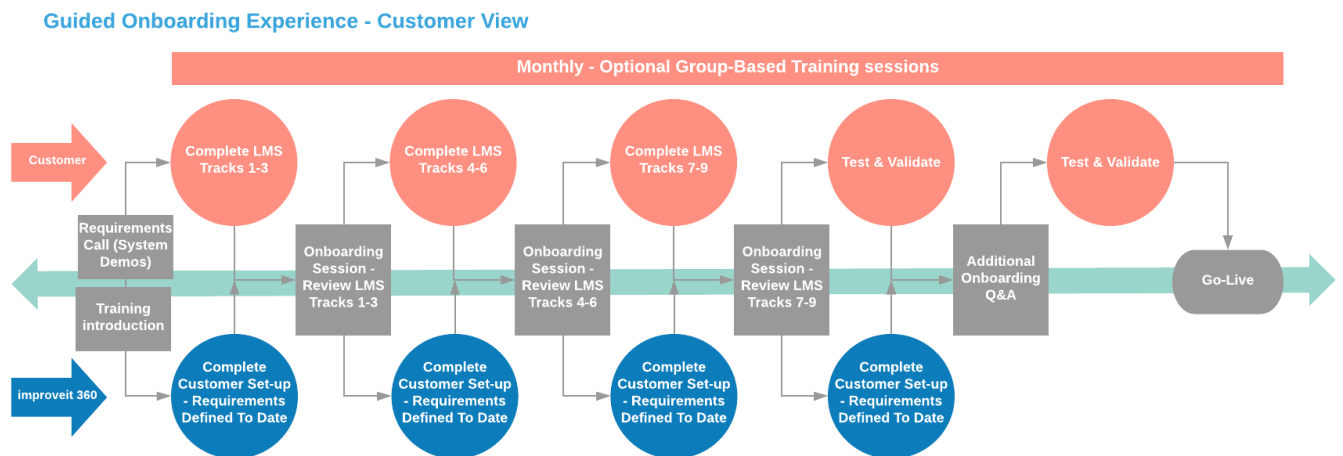
This initial session was designed to give your team instruction on how to complete the training curriculum and how to perform the setup tasks in the Onboarding Checklist. Each LMS training track has corresponding system setup tasks your team is responsible for completing within your new improveit 360 system. This initial meeting will walk you through those setup tasks and the timeline for completing them. On Day 1, you'll configure your system's company-wide email address, physical address and phone number, company logo and more.

When do we meet with improveit 360 one-on-one?

After completing 3 learning tracks, you will have a one-on-one Onboarding Session with an improveit 360 Consultant. Onboarding sessions are typically 60-90 minutes in length, allowing ample time to revisit the learning content one-on-one with an improveit 360 Consultant. During that time, our team will work to close any gaps in training knowledge assuring you have a good understanding of the most recent training content.

During the Onboarding Session, our team will also help you to identify configuration needs around your specific business processes. How far in advance do you call to confirm Appointments? Do you need a unique lead-funnel for HomeAdvisor leads? The Onboarding Session is the time to discuss those needs with us! An improveit 360 Solutions Consultant will assist with configuring your system to track critical business processes and key metrics.

Here's a quick overview of what our training program looks like:

Guided Onboarding Experience - Customer View

Monthly - Optional Group-Based Training sessions

Customer

Complete LMS Tracks 1-3 | Complete LMS Tracks 4-6 | Complete LMS Tracks 7-9 | Test & Validate | Test & Validate

Requirements Call (System Demos) | Training introduction | Onboarding Session - Review LMS Tracks 1-3 | Onboarding Session - Review LMS Tracks 4-6 | Onboarding Session - Review LMS Tracks 7-9 | Additional Onboarding Q&A | Go-Live

improveit 360

Complete Customer Set-up - Requirements Defined To Date (x4)

Why is most of the training self-led?

"Adult learners are more likely to succeed and have better long-term retention when they can self-direct and have more autonomy and decision making over their own educational timeline." – American Institute for Research, TEAL Center.

For this reason, our training program is learn-at-your-own-pace. We know everyone learns at different speeds, so whether you're the tortoise or the hare, and whether you learn better at 10am or 2am, our Learning Management System is available to you 24/7/365. Our training program combines learning tracks with one-on-one Onboarding sessions to provide your team with the most exposure to your new system while also following proven adult learning methods.

What if our staff needs more instructor-led training?

improveit 360 offers free monthly instructor-led webinar training to supplement (not replace) completion of the LMS tracks. Our two-day monthly webinar series provides an opportunity to learn the improveit 360 software in a group environment, where you can ask questions and hear questions posed by industry peers. Session topics are published ahead of time so any member of your team can drop-in to the webinar for just the topics most relevant to their role in your organization.

Click HERE for the current webinar schedules.

For additional information on our training program for new customers, please reach out to info@improveit360.com.

EXISTING CUSTOMERS

What type of training is offered to existing customers?

Once per month, we offer a two-part half-day webinar series, covering the basics from Lead Entry to Project Completion, as well as the basics of Understanding Reports. Available to your entire staff free-of-charge, once per month, these webinars provide an opportunity for your staff to ask questions and hear questions posed by industry peers. Session topics are published ahead of time so any member of your team can drop-in to the webinar for just the topics most relevant to their role in your organization.

Click HERE for the current Webinar Schedules.

Custom Training and Professional Consulting Services

improveit 360 also offers one-on-one Custom Training and Consulting Packages for a fee: one-on-one Training/Consulting - $1000/day. We can tackle the toughest processes and procedures for your business when we dedicate our time to you!

For your custom Training and Consulting Session we will…

- Work with you to develop a "top priorities" agenda
- Provide a robust virtual training platform allowing complete screen and video sharing – you will see us, and we want to see you!
- Provide follow-up materials to aid your team in executing your plan of attack after the session concludes

We ask that you prepare for this session…

- Have the right technology – a headset or earbuds with a built-in microphone will help you focus, engage, and alleviate distractions. It also ensures that you can hear us, and we can hear you!
- Have your laptop ready – although you may work from a mobile device in the field, the software is a desktop application so be ready with your laptop and prepared to share your computer screen with us.
- Take the day! – when you pay for our undivided attention, reserve a quiet space for yourself, away from the hustle and bustle of your office. A quiet place to focus will assure you are ready to get down to business.
- Bring the right people to the meeting – the individuals involved in the "top priority" agenda items need to be present and attentive, assuring that together we can implement new processes and ensure system best practices are executed after the training/consulting concludes.
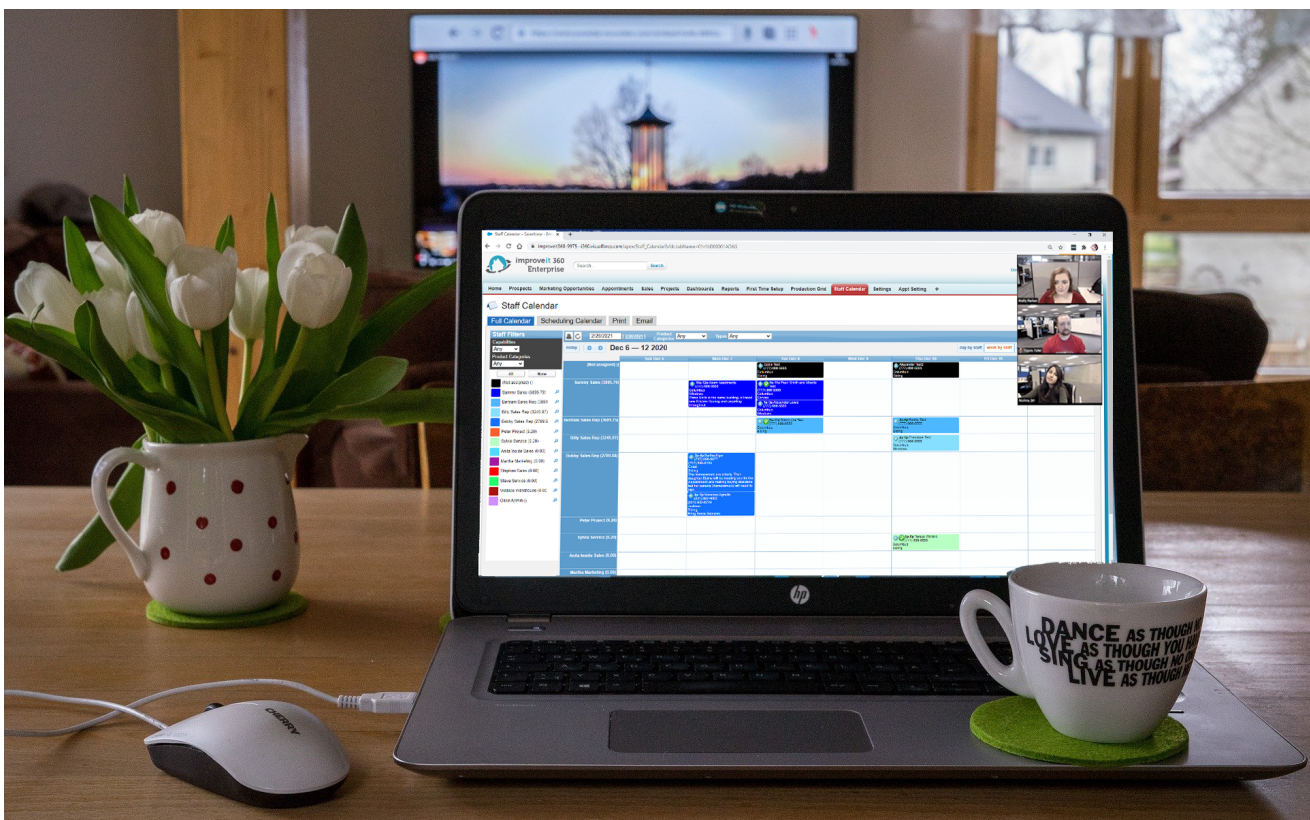
Are there CE (Continuing Education) Opportunities for our Administrator in the future?

Yes! improveit 360 wants to empower your System Administrator User to become more proficient and ultimately more self-reliant. improveit 360 offers Advanced System Administrator Training annually. Advanced Admin sessions are $1500 and are typically 3-day trainings in a group environment with a set agenda. System Admin Users are invited to learn more about a variety of topics including: Maintaining Data Integrity, Customizing User Access and Permissions, Customizing the User Interface, Building Custom Reports, and Creating and Troubleshooting Call Campaigns along with so much more!