

# ConnectWise Sales Whiteboard Workshop

Are you ready to propel your sales team and processes to new heights? Learn how to establish a seamless and effective sales process through ConnectWise with FocusPlanit's customized, on-site, sales workshop, designed exclusively for MSPs.

## *Why Choose a Tailored, On-Site Workshop?*

- **Personalized Learning:** Our workshop is your shortcut to mastering sales management within ConnectWise. Tailored to your team's unique needs and goals, we ensure your team gains relevant and actionable insights with custom training.
- **Team Cohesion:** Boost your team's productivity and cohesiveness by learning together in a collaborative, on-site environment.
- **Tailored Just for You:** We're your partners on your sales journey and we bring the workshop to your doorstep, aligning every step with your team's unique needs and challenges.

## Key Objectives

- Opportunity Management
- Effective Activity Management
- ConnectWise Data Analysis
- Sales Workflows



# What Will Your Team Learn?

Transform your sales process into a well-oiled machine, converting leads into devoted clients through the power of ConnectWise. In this highly personalized workshop, we'll cover essential topics on all things Sales in ConnectWise:

**Opportunity Management:** Streamline your sales process and turn leads into loyal clients. Learn how to effectively manage and setup your team's opportunities.

**Effective Activity Management:** Equip your sales team with the right steps and strategies to effectively manage sales activities within ConnectWise.

**ConnectWise Data Analysis:** Learn how to analyze the sales data and reports in ConnectWise. Understand how to interpret and harness the power of your sales data to enable data-driven decision-making and be a compass for success.

**Sales Workflows:** Optimize your team's productivity and automate your sales processes with customized workflows that align with your business objectives.



**FocusPlanit**  
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