

CHANGE MANAGEMENT TEMPLATE

OVERVIEW

WHAT: Copper is a user-friendly CRM integrated with Google. Copper increases collaboration, while decreasing the need for data entry.

WHY:

HOW:

TEAM USABILITY

NAME AND ROLE:

COPPER WILL HELP ME WITH:

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NAME AND ROLE:

COPPER WILL HELP ME WITH:

NAME AND ROLE:

COPPER WILL HELP ME WITH:

RECORD DEFINITIONS

LEADS:

COMPANIES:

PEOPLE:

OPPORTUNITIES:

PROJECTS:

TASKS:

RECORD IMPORT

WE IMPORTED OUR RECORDS FROM:

SAMPLE EXERCISE

_____ IS A NEW PROSPECT.
ADD THEM INTO COPPER AND LOG AN ACTIVITY.

_____ HAS BEEN QUALIFIED,
CONVERT THEM INTO AN OPPORTUNITY.

_____ IS INTERESTED IN MOVING FORWARD,
UPDATE THEIR OPPORTUNITY STAGE AND
SET A TASK TO IDENTIFY YOUR NEXT STEPS.

_____ JUST SIGNED THEIR CONTRACT,
UPDATE THE OPPORTUNITY STATUS.