

— USER TRAINING GUIDANCE

Copper Change Management.

Change Management worksheet [↗](#)

Overview

Why is Copper being implemented?

How will Copper support your goals?

ADMIN - Customize the **why** and **how** for your team.

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

WHY:

HOW:

Team Usability

Let's take a moment to discuss how each team member will rely on Copper to improve our workflows.

USERS - How are you planning to gain insights and efficiency using Copper?

NAME AND ROLE:

COPPER WILL HELP ME WITH:

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Record Definitions

ADMIN - Enter your record definitions and renamed entities if necessary.

LEADS:

COMPANIES:

PEOPLE:

OPPORTUNITIES:

PROJECTS:

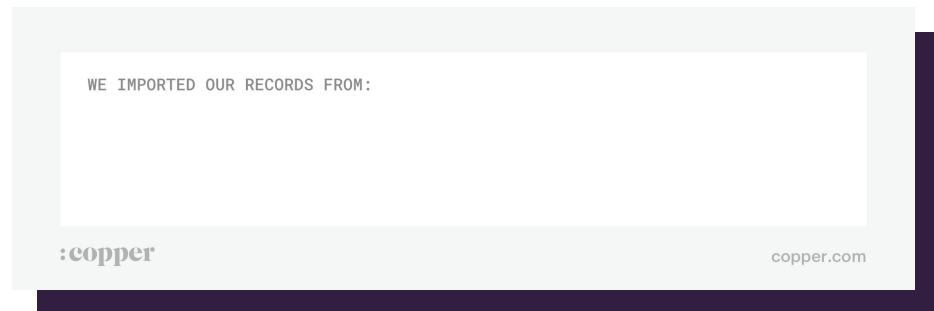
TASKS:

Data Migration & Integrity

ADMIN - Enter your data migration sources.

You can import new contacts by the following methods:

- [Google Contact Import Instructions](#)
Adding in bulk
- [Using the Chrome Extension](#) Adding
one by one



The Lifecycle of a Customer in Copper

USERS - Take a moment to view the following video clips for guidance on managing a customer in Copper:

[Navigating Copper](#) 

[Working with Contacts in Copper](#) 

[Working with Deals in Copper](#) 

[Managing Outreach and To-Do's](#) 

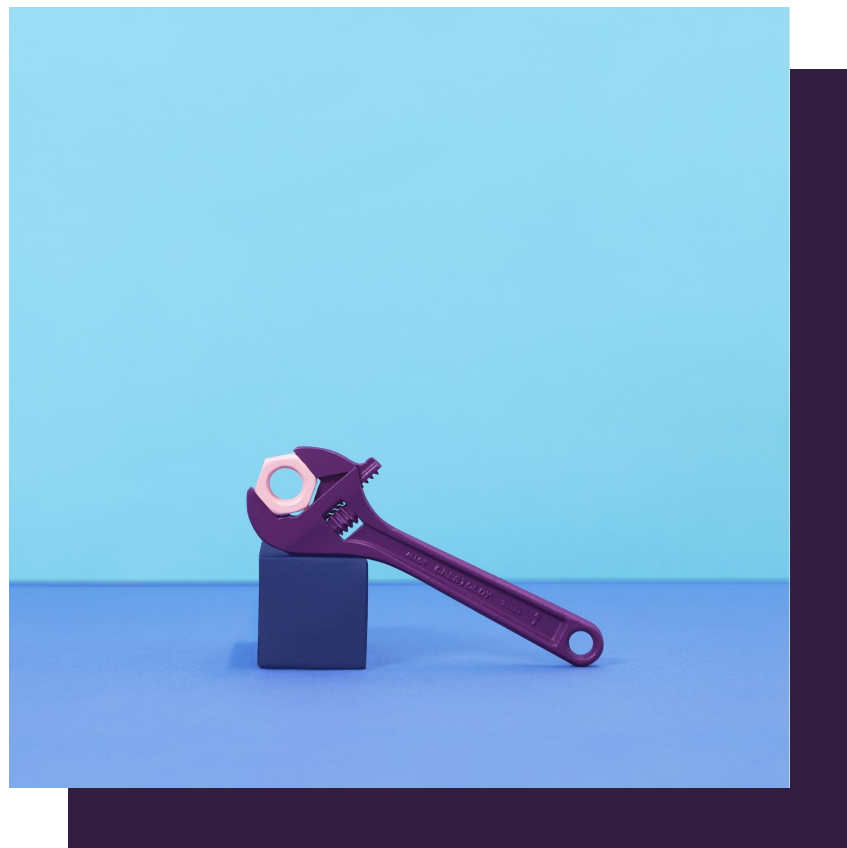


Helpful Tips & Tricks

[Filtering Records](#) 

[Sending Bulk Emails from Copper](#) 

[@ Mentioning Colleagues in Activities](#) 



Sample Exercise.

Now that you have an understanding of how to navigate Copper, let's add some sample data into your Copper platform.

Sample Exercise

ADMIN - Fill in the blanks for your team to follow along in Copper.

_____	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.

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