Building The Ultimate Marketing And Operations Machine

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Marriott Hotel's Guiding Principle On Standard Operating Procedures (SOPs):

"When I say that the company's prosperity rests on such things as our sixty-six-steps-to-clean-a-room manual, I'm not exaggerating,"

- **J.W. Marriott Junior**

http://www.economist.com/news/christmas-specials/21591743-be-my-guest

Author's Note

Most marketing books, magazines, etc. assume that the student is already a marketer or understands the nuances of marketing. Robin Robin's Technology Marketing Toolkit simplifies classic marketing techniques and wraps them in a usable form for IT companies.

As CEO of Brainlink, it is incumbent upon me to UNDERSTAND marketing and DEVELOP / IMPLEMENT STRATEGIES.
The tactics are best left to staff. (and when I switch hats from CEO/CMO to marketing tech, the SOPs help me save time and avoid aggravation).

Purpose Of This Document:
To document marketing processes and activities In use at Brainlink.

The SOPs simplify recurring marketing activities (Importing, processing and marketing to contacts; creating newsletters; handling rejected newsletters; gathering & using testimonials) into simple recipes that anyone can follow.

Author's Intention:
I hope you do NOT blindly copy my SOPs – they work for me & my team. You should pick whichever SOP appeals to you and rewrite it for your company. We use ConnectWise, Pronto, ITSAutopilot, Cardscan, Outlook 2010.

If your tools or vendors are different then you should adapt.

I sincerely hope that you use this set of recipes as a Launchpad to accelerate your marketing and sales efforts into high gear.

The Scientific Method (as it applies to marketing):

At Bronx Science, I was introduced to the Scientific Method.
Scientific Method demands that the results be reproducible. An experiment that only works once is a failure.
These SOPs allow us to replicate the results consistently, month after month.

2013/2014 Marketing SOPs

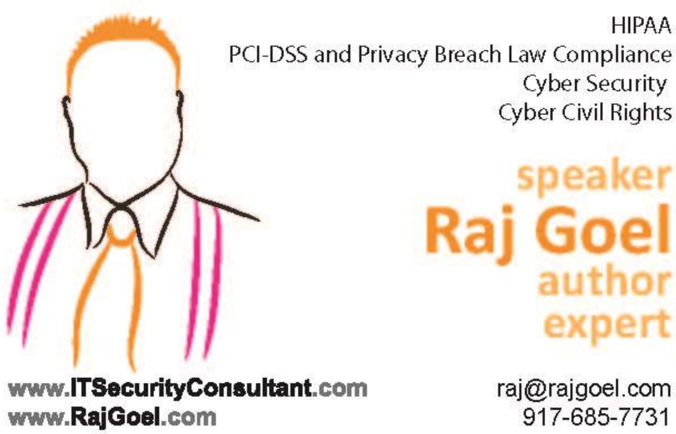
1) This is my attempt at sharing our processes/experiments in marketing in hopes that other MSPs and VARs can replicate the marketing results (generate that newsletter! Send that eblast! Gather those Testimonials!)

2) We also hope that companies with different tools (Autotask, Constantcontact, Mailchimp, etc.) will adapt these SOPs and SHARE them with others widely, and free-of-charge to improve the marketing effectiveness of fellow professionals everywhere.

Guiding Philosophy:
I am the possibility of FAMILY, FUN and FREEDOM.
I believe that success is within our grasp – we just have to reach for it.
I believe that when we professionalize our profession as IT professionals and Business owners, we will see a significant shift in revenues, profitability and happiness.
I believe that by learning from our peers, we move ourselves forward FASTER.
I believe that when we SHARE our successes, we move EVERYONE forward even faster.
I believe the promises enshrined in the US constitution: Life, Liberty and the pursuit of happiness.

The rising tide lifts all boats. This is my river flowing into the ocean.

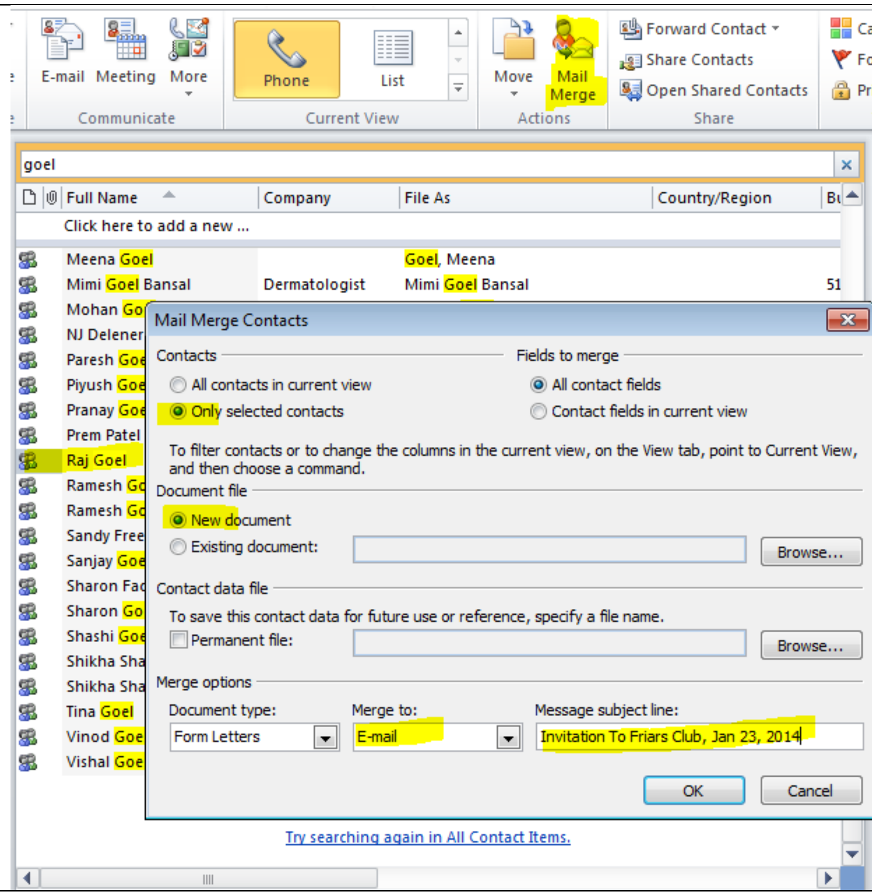
These processes have contributed greatly to our success. I hope they contribute even more to yours.

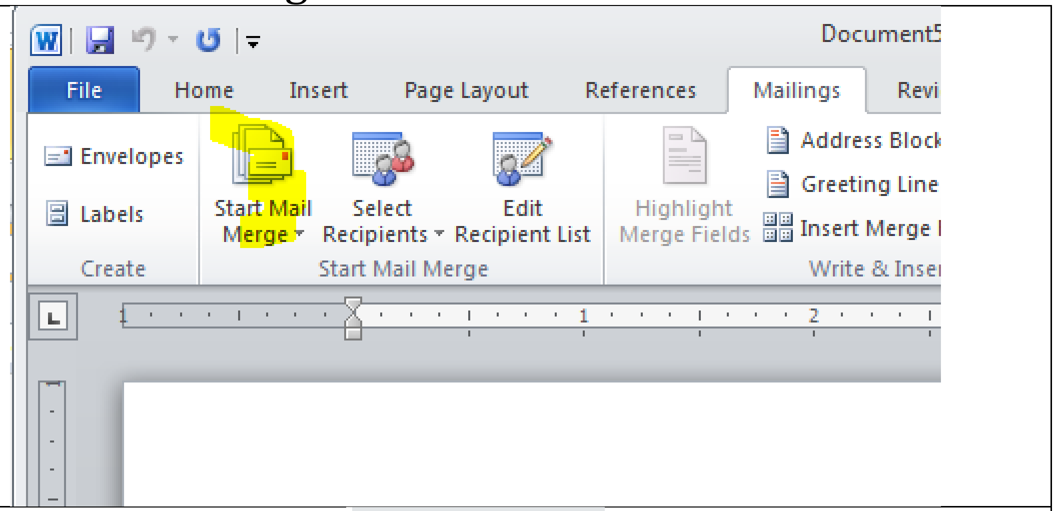
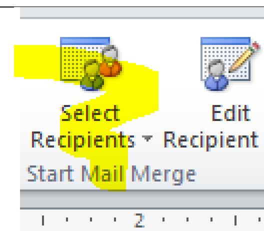
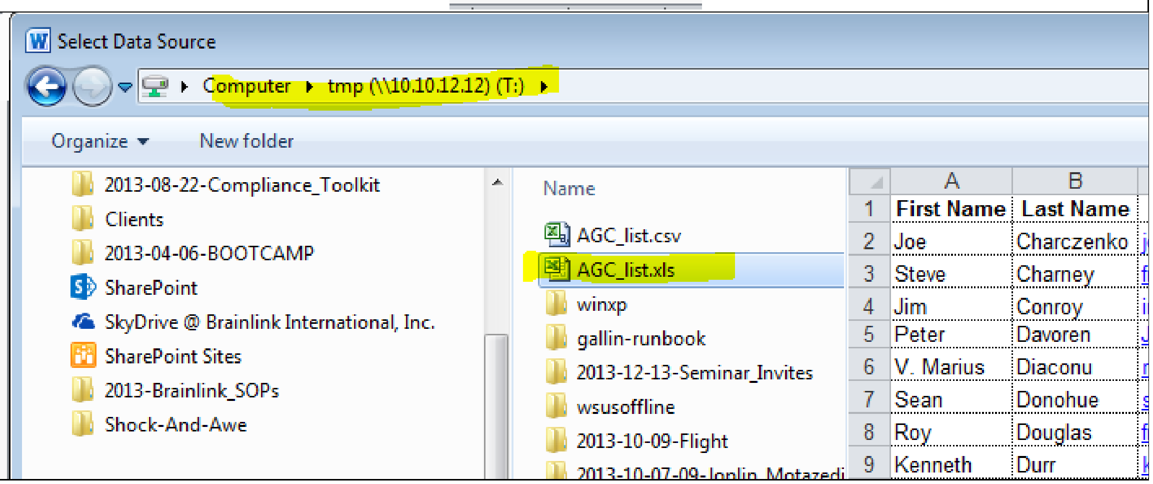


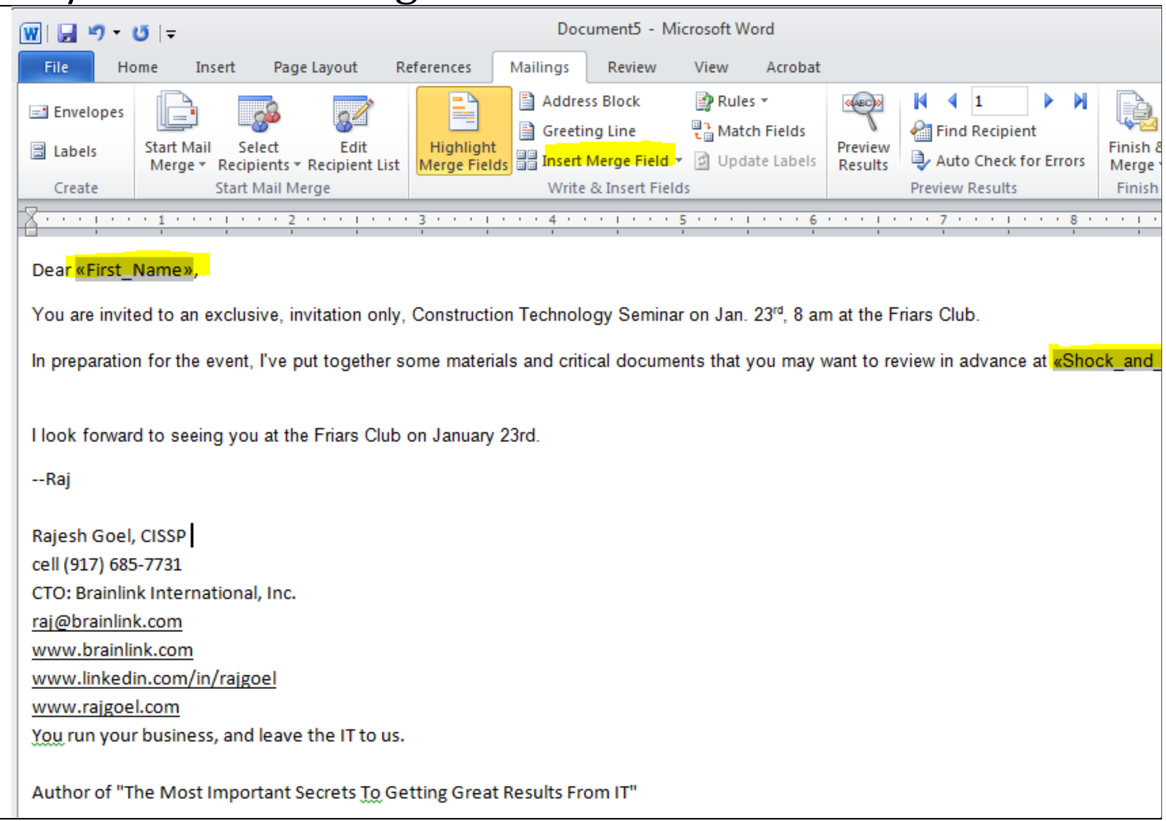
SOP Template

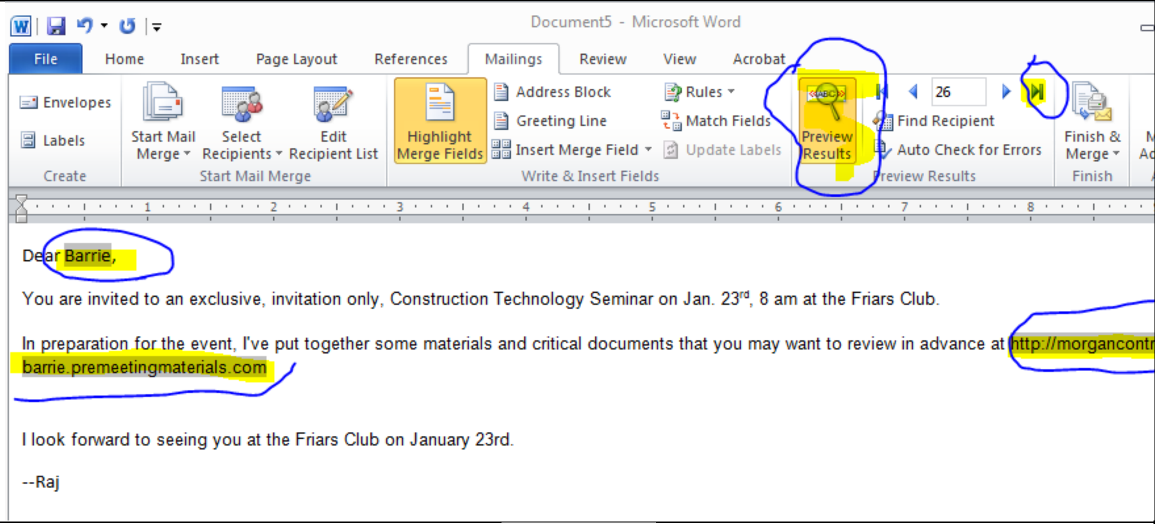
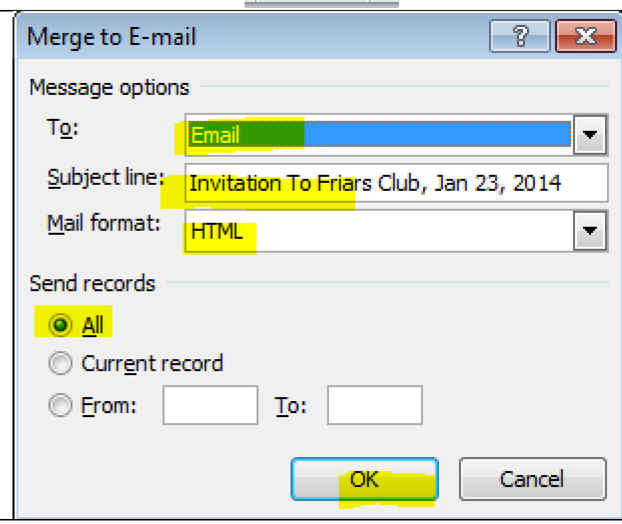
	3 column template How to use this template: For each step, enter a description in the 2nd column Insert appropriate screenshots in the 3rd column All SOPs must be tested & signed off by 2 team members,	
Step	Description	Screenshot
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

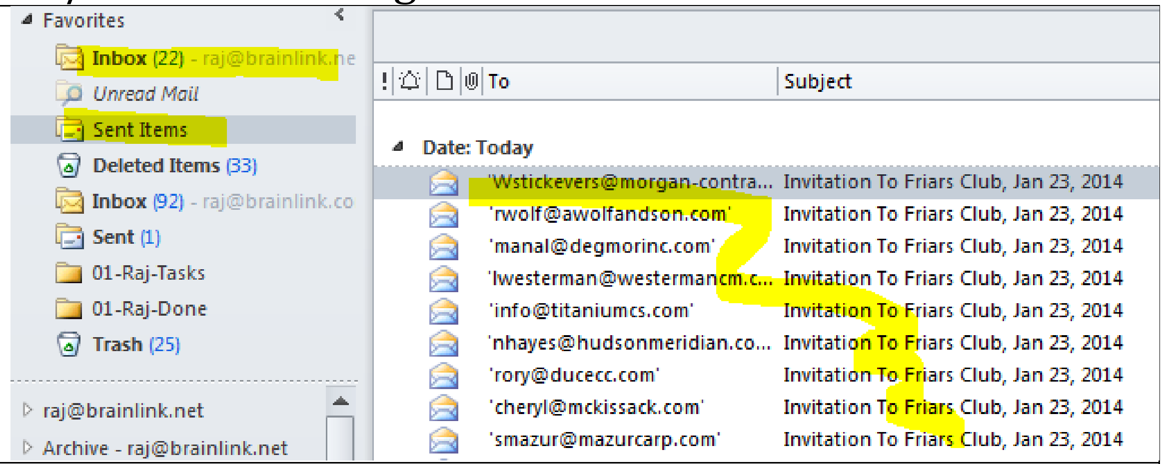
1) SOP - Creating MAIL MERGE emails from Outlook

Step	Description	Screenshot
1.	Login to Raj's outlook	
2.	Select any contact Click **MAIL MERGE** Select these options - Only Selected Contacts - New Document - Merge To: EMAIL - Enter the **SUBJECT**	

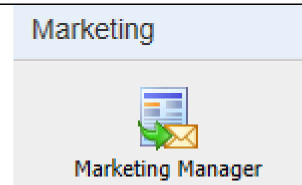
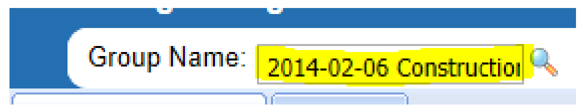
<table>
<tr><td>3.</td><td>In Microsoft Word, select
START MAIL MERGE -> Email Messages</td><td>
</td></tr>
<tr><td>4.</td><td>Click Select Recipients -> Use Existing List</td><td>
</td></tr>
<tr><td>5.</td><td>Select the spreadsheet containing the names, email addresses, merge info</td><td>
</td></tr>
</table>

6.	Use the **INSERT MERGE FIELD** feature to insert the merge fields into the email.. Create & complete the letter.	

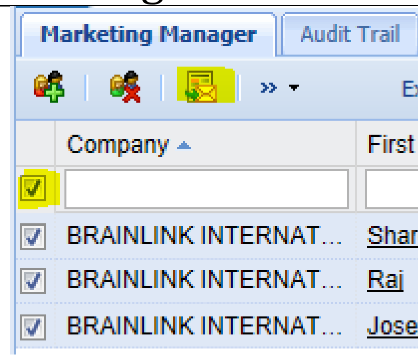
7.	Use the **PREVIEW RESULTS** feature to double-check the mail merge	
8.	Click **FINISH & MERGE -> Send Email Messages**	
9.	Click **OK**	

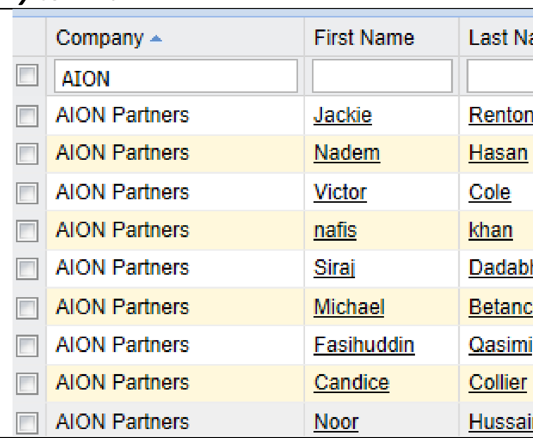
10.	Check Raj's **SENT** Folder in Outlook to confirm the messages were sent. Deal with any bounce-backs.	

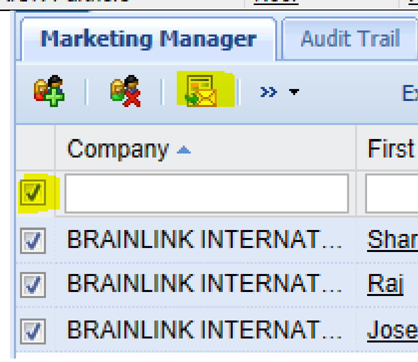
2) SOP - Sending Blast E-mail using ConnectWise

Step	Description	Screenshot
You can use ConnectWise to send blast emails to multiple contacts. The emails can be sent to pre-defined groups, the contacts of a Company, or any set of contacts you manually choose		
1.	Log on to ConnectWise either through the Desktop App or at https://brainlink.myconnectwise.net	
2.	Navigate to **Marketing → Marketing Manager.**	
At this point, decide if you are sending Email to a Group (go to step 3), a company (go to step 5), ormultiple contacts from several sources (goto step 7)		
Selecting Email to a Group		
3.	*If sending mail to a Group:* In the **Group** Name Search tool, search for the Group containing the contacts you want to E-mail. See **Creating Groups in ConnectWise** SOP for instructions on how to create a Group, if needed.	

<table>
<tr><td>4.</td><td>In the list of Contacts, check off the ones you want to send to, or choose the Select all check Box. Click the Proceed to the next step with the selected contacts Button

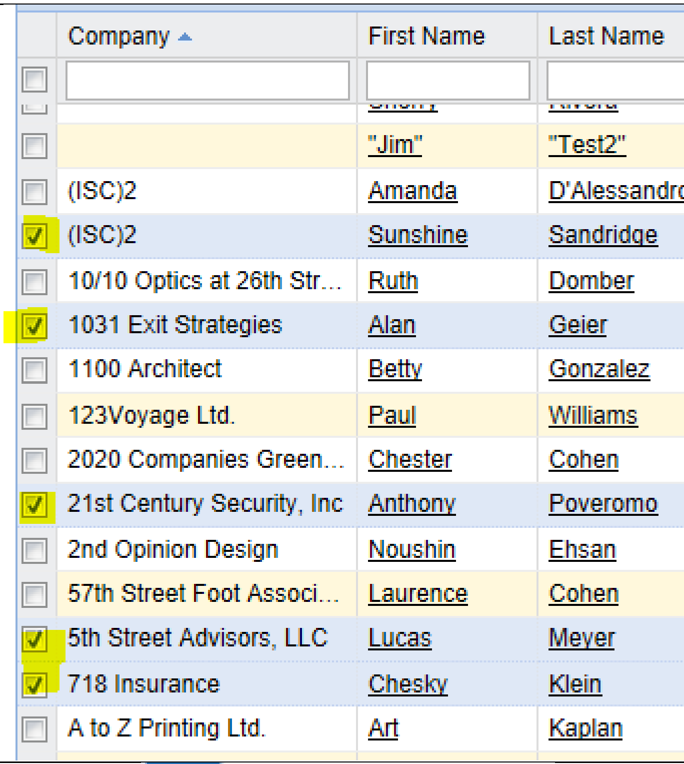
Go to Step 9</td><td>
</td></tr>
<tr><td colspan="3">Selecting a Company to Email</td></tr>
<tr><td>5.</td><td>If sending mail to the Contacts of one Company:

Type in the Company that contains the contacts you want to add</td><td>
</td></tr>
<tr><td>6.</td><td>In the list of Contacts, check off the ones you want to send to, or choose the Select all check Box. Click the Proceed to the next step with the selected contacts Button

Go to Step 9</td><td>
</td></tr>
</table>

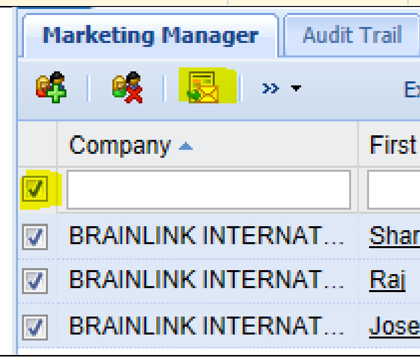
<table>
<tr><th colspan="3">Selecting Contacts to Email</th></tr>
<tr><td>7.</td><td>If sending Email to contacts from multiple groups/companies:

Hit Enter to display all contacts</td><td>

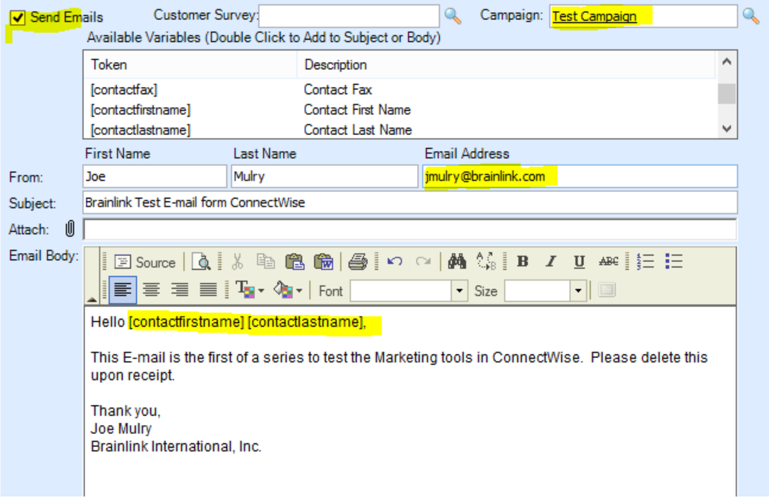
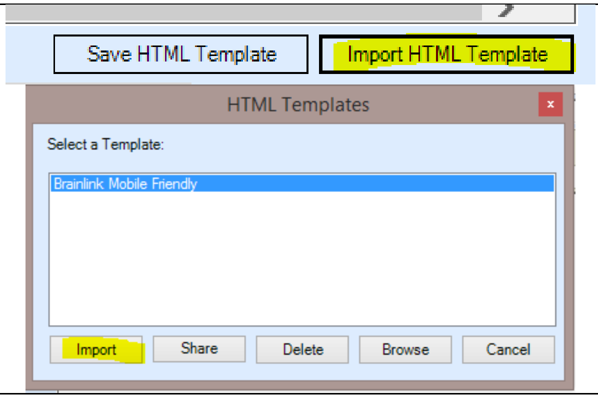


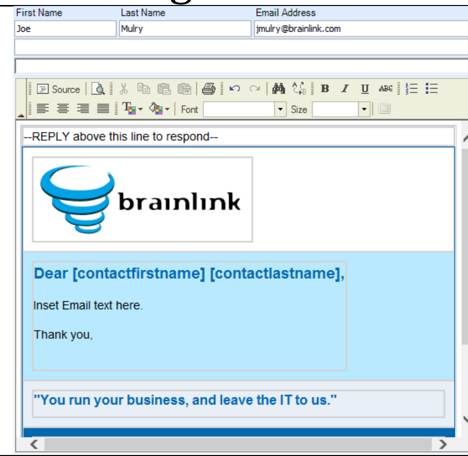
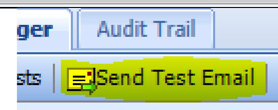
</td></tr>
<tr><td>8.</td><td>In the list of Contacts, check off the ones you want to send to. Click the Proceed to the next step with the selected contacts Button

Go to Step 9</td><td>

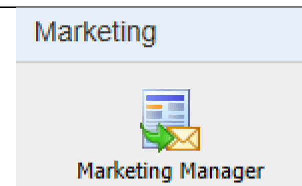
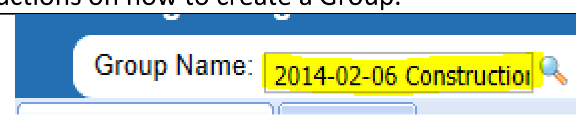


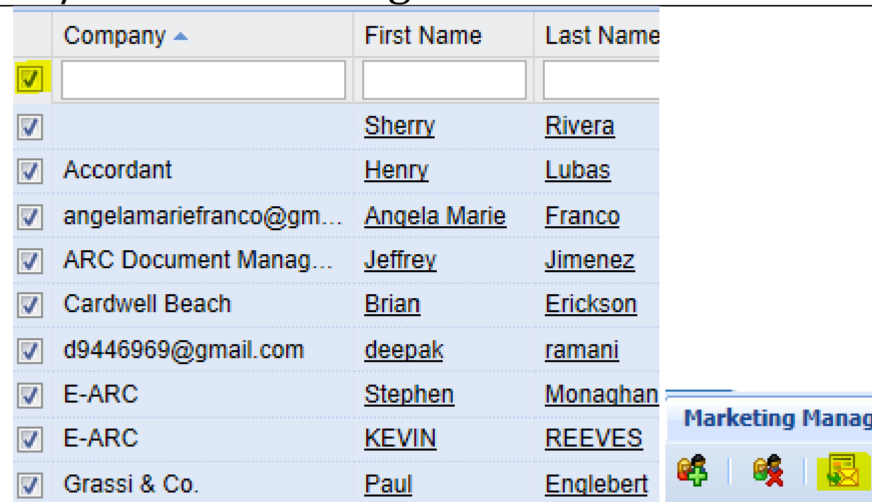
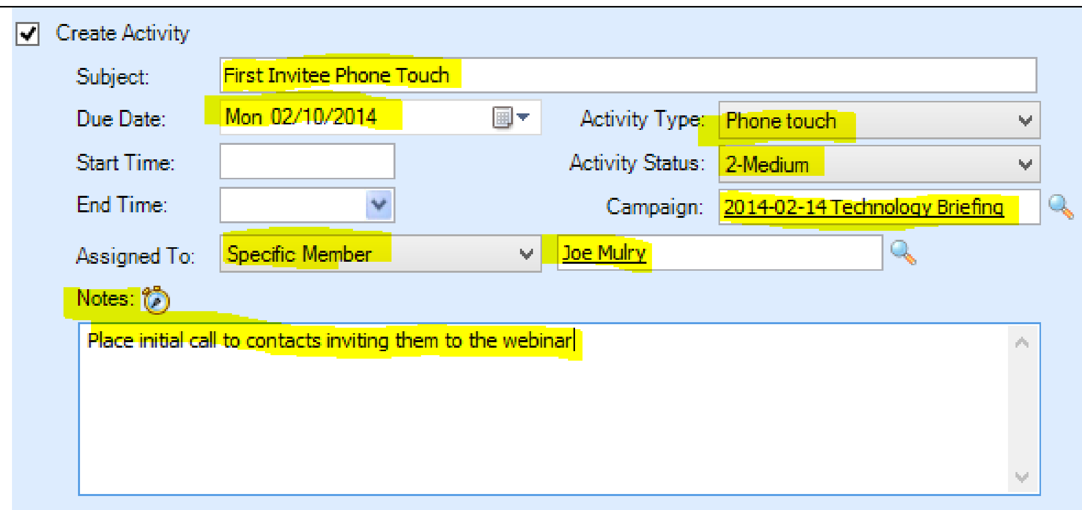
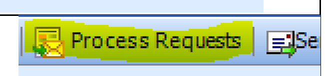
</td></tr>
</table>

9.	On the **Actions** screen, make sure **Send Emails** is checked. If this email blast is part of a ConnectWise Campaign, select it in the **Campaign** section (See **Creating a Marketing Campaign in ConnectWise** SOP for instructions on how to create a Marketing Campaign, if needed). If needed, adjust the Email Address in the From section. Fill out a Subject and Body for the E-mail. Use the **Available Variables** where appropriate.	
10.	Optionally, you can apply a **HTML Template** to improve the look of the email. Click **Import HTML Template**. Select the Template you want to use, and click **Import**. See **Creating Email HTML Templates in ConnectWise** SOP for instructions on how to create a template, if needed.	

		
11.	Click the **Send Test Email** button. A Test e-mail will be sent to the person logged into ConnectWise. Verify the test Email is received and has no errors.	
12.	Click the **Process Requests** button to send the Emails.	

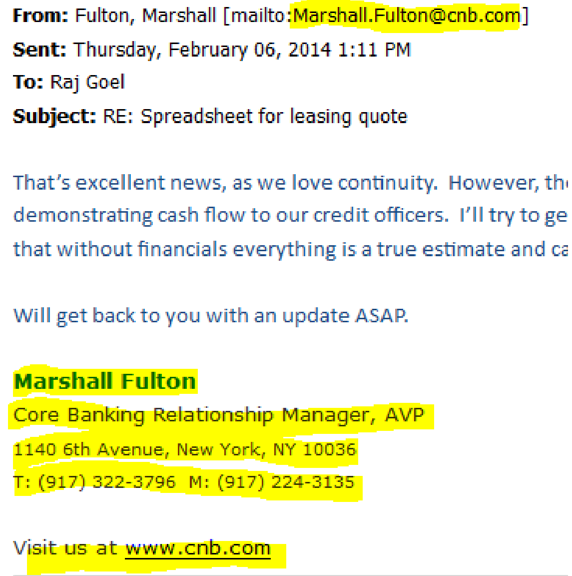
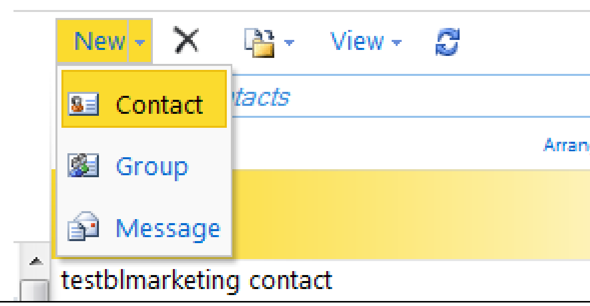
3) SOP - Assigning an Activity for a Marketing Campaign in ConnectWise

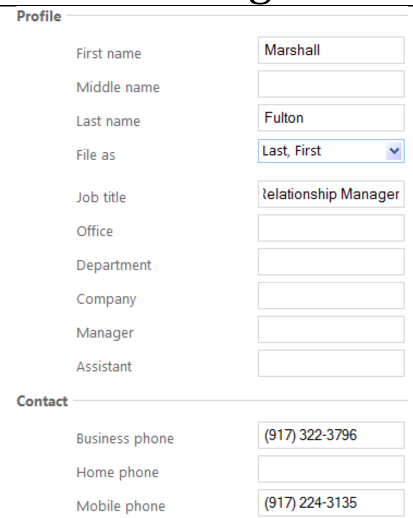
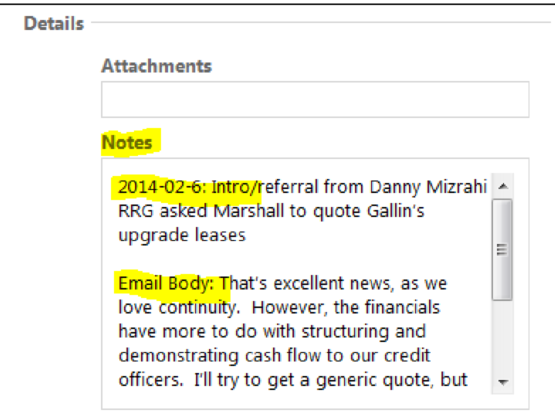
Step	Description	Screenshot
When using Marketing Campaigns for events such as webinars or live events, Activities are used to assign and audit tasks such as phone calls and mailings. This SOP shows how to create an activity, associate it with a Marketing Campaign, and assign that task to a user in ConnectWise		
1.	Log on to ConnectWise either through the Desktop App or at https://brainlink.myconnectwise.net	
2.	Navigate to **Marketing** → **Marketing Manager.**	
Note: This SOP assumes that there is a Marketing Campaign created in ConnectWise for the event you are scheduling an activity for. See **Creating a Marketing Event in ConnectWise** SOP for Instructions on how to create a Marketing Campaign. This SOP assumes that a Group has been created for the contacts that are invited to taking part in this event. See **Creating Groups in ConnectWise** SOP for instructions on how to create a Group.		
3.	In the **Group** Name Search tool, search for the Group containing the contacts invited to take part in the event.	

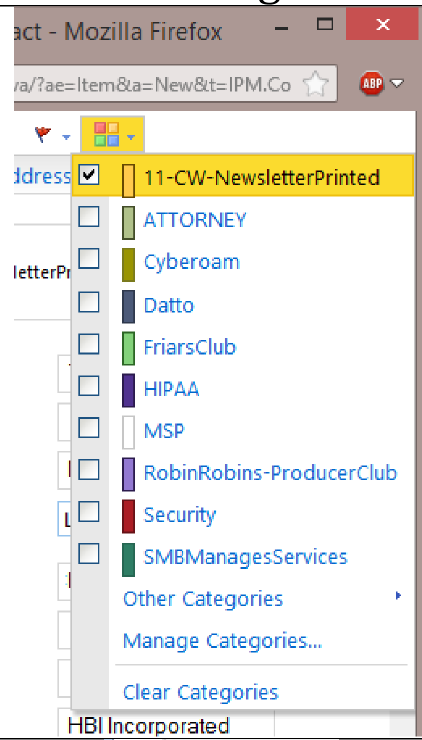
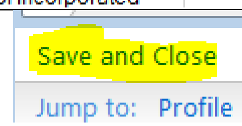
<table>
<tr><td>4.</td><td>In the list of Contacts, choose the Select all check Box. Click the Proceed to the next step with the selected contacts Button</td><td>
</td></tr>
<tr><td>5.</td><td>On the Actions Screen, Uncheck the Send Emails button. Scroll down and check the Create Activity button</td><td>
</td></tr>
<tr><td>6.</td><td>Fill out the Subject for the activity
Set a Due Date
Select an Activity Type
Set a Status for the Activity
Search for and select the Campaign this Activity is for
Set Assigned To: to Specific Member, then select the person to be assigned this activity
Under Notes, describe the Activity.</td><td>
</td></tr>
<tr><td>7.</td><td>Click the Process Requests button to assign this Activity.</td><td>
</td></tr>
</table>

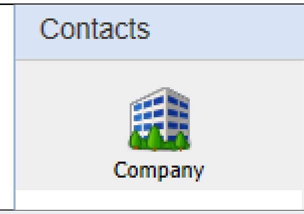
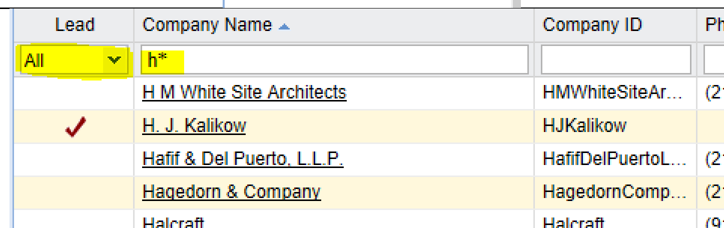
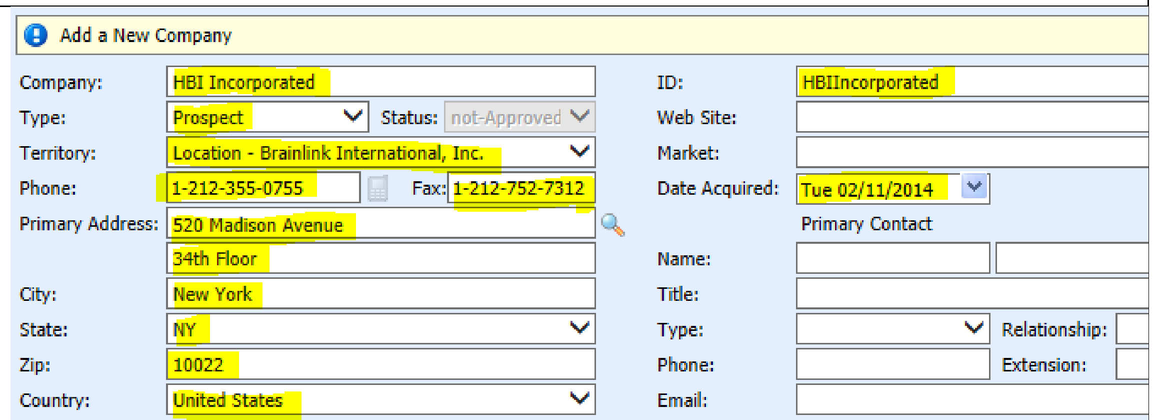
4) SOP - Processing new Leads/Contacts

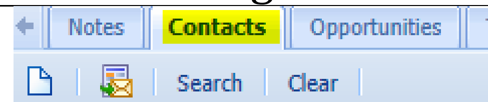
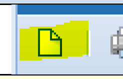
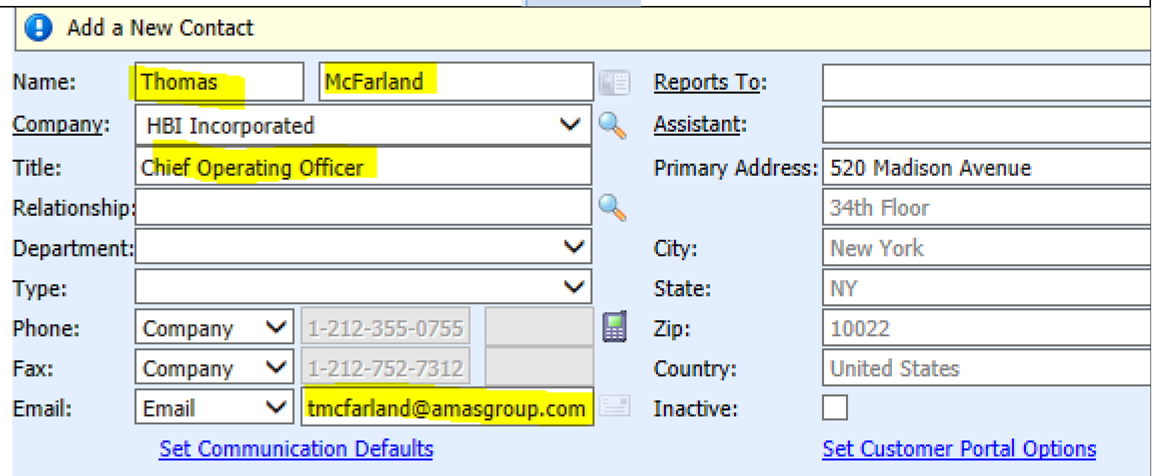
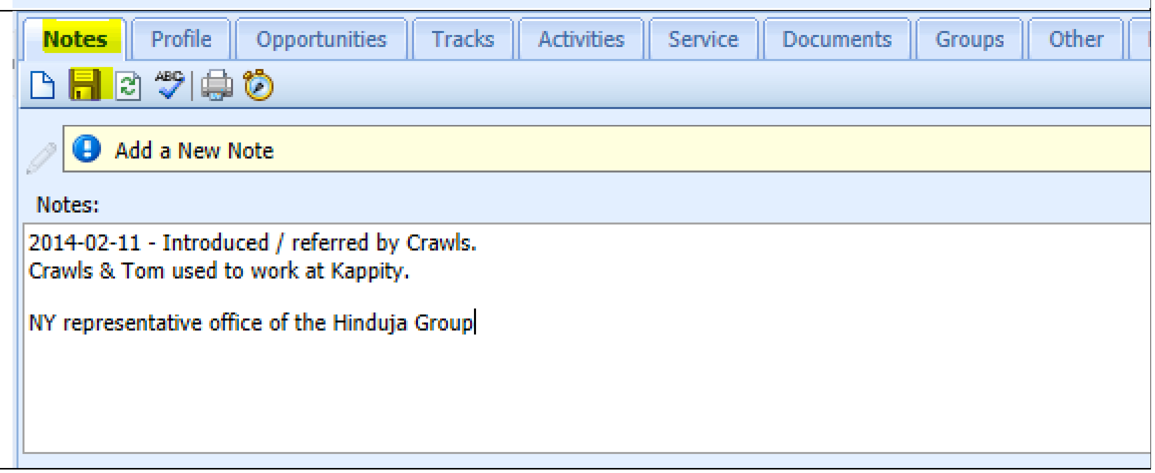
Step	Description	Screenshot
	Adding Contact to BL Marketing user's OWA contacts	
1.	Log on to https://mail.brainlink.net/owa Username: brainlink\MARKETING_USER Password: XXXXXXXXXX	
2.	When a new Lead/Contact is received, note the following: a) Contact name & address b) Contact Company c) Contact Category d) Date of Email e) Contact notes f) Contact relationships, if any	

		 **From:** Fulton, Marshall [mailto:Marshall.Fulton@cnb.com] **Sent:** Thursday, February 06, 2014 1:11 PM **To:** Raj Goel **Subject:** RE: Spreadsheet for leasing quote That's excellent news, as we love continuity. However, th demonstrating cash flow to our credit officers. I'll try to ge that without financials everything is a true estimate and ca Will get back to you with an update ASAP. **Marshall Fulton** Core Banking Relationship Manager, AVP 1140 6th Avenue, New York, NY 10036 T: (917) 322-3796 M: (917) 224-3135 Visit us at www.cnb.com
3.	Create a new contact for the Contact/Lead Navigate to **Contacts** and select **New → Contact**	

4.	Enter The First Name, Last Name, Job Title (if known) Company (if known), Business Phone, Email Address, and Company Address (If known) If any of the above is not known, research using LinkedIn, Google, etc.	 Profile First name: Marshall Middle name: Last name: Fulton File as: Last, First Job title: ~~R~~elationship Manager Office: Department: Company: Manager: Assistant: Contact Business phone: (917) 322-3796 Home phone: Mobile phone: (917) 224-3135
5.	Enter notes for the contact: YYYY-MM-DD: Contact Notes Email Body:	 Details Attachments Notes 2014-02-6: Intro/referral from Danny Mizrahi RRG asked Marshall to quote Gallin's upgrade leases Email Body: That's excellent news, as we love continuity. However, the financials have more to do with structuring and demonstrating cash flow to our credit officers. I'll try to get a generic quote, but

6.	Click the **Apply Categories** button and add the contact to the categories requested on the email If the Category does not yet exist, **ask Raj before creating a new one**	
7.	Click **Save and Close** to save the contact.	
8.	Identify a **Follow up Action** depending upon how the contact was obtained/who the contact is: a) If Contact contacted us via email, send welcome e-mail back b) If the Contact is a scanned business card, send welcome e-mail back and suggest the next face to face meeting c) If Contact was a face to face meeting, send email scheduling next face to face meeting d) If Contact was a **referral** or a contact **through another client/lead**, send email referencing the introducing contact	

Adding Contact to ConnectWise		
9.	Log on to ConnectWise either through the Desktop App or at https://brainlink.myconnectwise.net	
10.	Navigate to **Contacts →** **Company**	
11.	Search for the contact's company. **Only create a new company if the contact's company does not yet exist**. Make sure you search **All** companies, not just active ones.	
12.	Click the **New Item** button. Note – if the company already exists, skip to step 14	
13.	Enter the: Company Name Phone Fax Address Set Type to **Prospect** Assign a Company ID with No Spaces Set Date Acquired to date of email Click Save to Save the Company	

14.	With the Company open, click on the **Contacts** tab	
15.	Click the **New Item** button	
16.	Enter the: First & Last Name Title E-mail Address Click Save to Save the Contact	
17.	Click on the **Notes** tab Enter the same notes for this contact that was entered on step 5.	

5) SOP - Getting and Using Testimonials

Step	Description	Screenshot
	PURPOSE: Get great testimonials for use on - Website - Shock & Awe - Seminars - Client Of the Month in newsletters	
1	Send the following email to client contract manager (the person who signed the contract or we have great working relationship with). NOTE: **DO NOT use CONSTANT CONTACT or mail manager.** **This <u>MUST</u> be a personal email.** **Include any details** **e.g.** **Joe,** **As we discussed last week….**	Subject: **Featuring <<CLIENTNAME>> in our newsletters** Message: Dear <<FIRSTNAME>>, We'd love to feature <<CLIENTNAME>> in our newsletters. Could you take 5 minutes and answer these questions: A. What do you like most about our services? B. What is one thing we could do to improve our service to you? C. What could we do to deliver a complete "WOW" experience? D. What other products or services would you like to see us offer? E. Would you recommend our services to others? Why or why not? F. Please use this space to provide any other comments, suggestions, or advice:
2	Most people will NOT respond to this. If no response within 3-4 days, **CALL them** **Or DISCUSS during next onsite visit, QBR, etc.**	

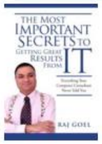
3	Once they respond, **REVIEW & REWRITE** **Most clients will not answer all questions. That's fine.**	e.g. original replay from client A. What do we do better than your previous IT guy? (or what problems have we solved for you)? Due to a sudden, unexpected loss of support from our long-standing IT guy, we found out how dependent we were on one person for all our IT needs. Brainlink came in and cleaned up a virus that had spread throughout entire network, upgraded all our computers and our server, and now has all our data backing up properly on an ongoing basis. Now, when something needs to be addressed, we hear about it from you before we even know about it ourselves. B. What do you like most about our services? Service is prompt and we feel confident that our data is secure. C. What is one thing we could do to improve our service to you? A little help with basic software questions if possible D. What could we do to deliver a complete "WOW" experience? You do! When you sat down with us to discuss our needs, we all felt immediate relief. We felt we were in very good hands. And Fabian is an ace. He's down to earth, friendly, responsive, and capable. What more can you ask? Everyone we deal with at Brainlink is great. E. What other products or services would you like to see us offer? F. Would you recommend our services to others? Why or why not? Yes. G. Please use this space to provide any other comments, suggestions, or advice:

4	Rewritten testimonial sent to client for review: BOLD or UNDERLINE the key takeaways	"Brainlink came in and cleaned up a virus that had spread throughout our entire network, upgraded all our computers and our server, and now has all our data backing up properly on an ongoing basis. Now, when something needs to be addressed, we hear about it from Brainlink before we even know about it ourselves. **When we sat down with Raj to discuss our IT needs, we all felt immediate relief. We felt we were in very good hands. And Fabian is an ace.** He's down to earth, friendly, responsive, and capable. What more can you ask? Everyone we deal with at Brainlink is great."
5	Email client the re-written text and ask for approval.	
6	**DO NOT USE UNTIL CLIENT SAYS APPROVED!**	
7	Ask for a photograph or offer to send one of ours.	
8	**What happens if we get a BAD REVIEW?**	Have Raj CALL or VISIT the client, determine where we dropped the ball & fix it asap. Yes, this has happened once. No, it's NOT the end of the world. But it WILL be if Raj doesn't know about it asap.

Examples of using Testimonials:

Newsletter

Page 4



Read the book!
(available on Amazon)
www.brainlink.com/book/

Upcoming Presentations

Sep 9 - Caribbean ICT Roadshow Keynote, Curacao

Sep 13 - Datto Conference Keynote - What do MSPs need to know about Compliance

ASIS 59 - Chicago, IL
Sep 24 - A Global Overview of Trends in Personal, Corporate and Government Surveillance

Sep 25 - Lessons Learned From Sandy

Win A Cruise for Two!

Our referral contest ends soon and we have a great prize for you:

Here's how the contest works:

- Email your referral to raj@brainlink.com
- Call us with your referral at 917-685-7731

We will call and schedule an appointment.

If you make more referrals to companies with 5 or more employees than anyone else, you win a Cruise worth up to $1,500.

Contest ends: August 15, 2013

Right Now, You Could Be Paying 91% of Your Employees An $8,600 A Year 'Bonus' To Download Porn, Search For Another Job, And Infect Your Network With Viruses

We've discovered (and stopped) employees from:

- Playing games
- Downloading movies (which is illegal!)
- Surfing "adult escort" sites
- Downloading porn
- Pirating software

If you're concerned about what your employees are doing online, or want to make sure they don't put your business at risk, give me a call.

My team can put together an effective internet security solution that blocks offensive surfing, puts you in the drivers' seat, and give you daily reports on who went where, and when.

- Raj

MEET OUR CLIENT OF THE MONTH
Alterman & Boop LLP

Dan Alterman & Arlene Boop have a vast amount of experience in litigating high profile cases that have appeared in newspapers around the world.

Located in Tribeca, they've worked together for over 30 years representing plaintiffs, employees, tenants, and victims of police abuse and other civil rights violations.

Why did they choose Brainlink?
"Brainlink came in and cleaned up a virus that had spread throughout entire network, upgraded all our computers and our server, and now has all our data backing up properly on an ongoing basis. Now, when something needs to be addressed, we hear about it from you before we even know about it ourselves. **When you sat down with us to discuss our needs, we all felt immediate relief. We felt we were in very good hands. And Fabian is an ace.** He's down to earth, friendly, responsive, and capable. What more can you ask? Everyone we deal with at Brainlink is great."

You can reach them at:
Alterman & Boop, LLP
35 Worth Street, 3rd Floor,
New York, NY 10013
(212) 226-2800 / sksmith@altermanboop.com

We love supporting Dan, Arlene, Susan and the entire team at A&B. If you'd like us to support you too, call me at 917-685-7731!

	In SHOCK & AWE Kit	See testimonials below

"He and his guys are very sharp..."

They have a holistic picture of what we're trying to achieve and he has a very good perception of what the businesses need. His advice has always been really practical and easy to implement and he's managed to get it done when he says he's going to do it. I've been really pleased with his work.

Our business was wiped out by a viral invasion prior to hiring Brainlink. He put us back in the business, he got all the glitches out, he got rid of the viruses, he cleaned out all the computers, he saved us in a very big way from failure**. It was really an impressive performance.**

Mark Ellis, Partner, Cornerstone Architects
www.corarchitects.com

"When we sat down with Raj to discuss our needs, we all felt immediate relief"

Brainlink came in and cleaned up a virus that had spread throughout entire network, upgraded all our computers and our server, and now has all our data backing up properly on an ongoing basis. Now, when something needs to be addressed, we hear about it from Brainlink before we even know about it ourselves. **When we sat down with Raj to discuss our needs, we all felt immediate relief**. We felt we were in very good hands. And Fabian is an ace. He's down to earth, friendly, responsive, and capable. What more can you ask? Everyone we deal with at Brainlink is great.

Susan Smith, Law Firm of Alterman & Boop, LLP
www.altermanboop.com

"Unlike our previous IT company, you were able to solve our computer problems"

Unlike our previous IT company, you **were able to solve our computer problems,** so that my secretary and **I can get our work out faster.** You are the best IT company I have dealt with!

Philip A Greenberg, Esq.

"Raj and his company are great people"

Brainlink is reliable, smart and fast moving. As we operate in a service industry and are a service business, when something doesn't work it reflects poorly on us. It doesn't matter whether it was Verizon's fault, our fault or their fault, Brainlink always wants to fix it. Brainlink enables us to deliver good service and are always rapid to respond. Raj and his company are great people. This gives me and my team confidence that at the end of the day we can deliver the really good service that our clients expect.

Paul Carter

As a 24x36 Poster or 8.5x11 flyer:

"The proactive planning makes my life a lot easier…"

I love the prompt response and the ticketing system. **Instead of wasting 10 phone calls calling our old vendor, now I get complete visibility in my email!** Having our internal IT staff plug into your ticketing system and follow that process has increased our productivity. I have fewer people in the field that are down or ignored. My staff gets back to work faster.

The project plans, proactive budgets and forecasts make my life easier.

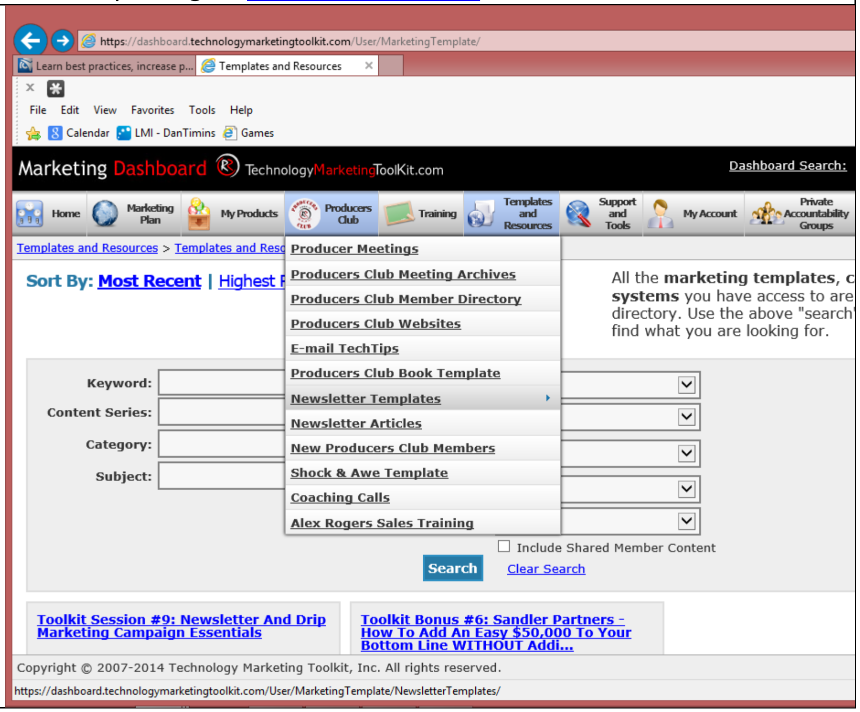
What sets Brainlink apart is that you guys are doing exactly what you said you were going to do.

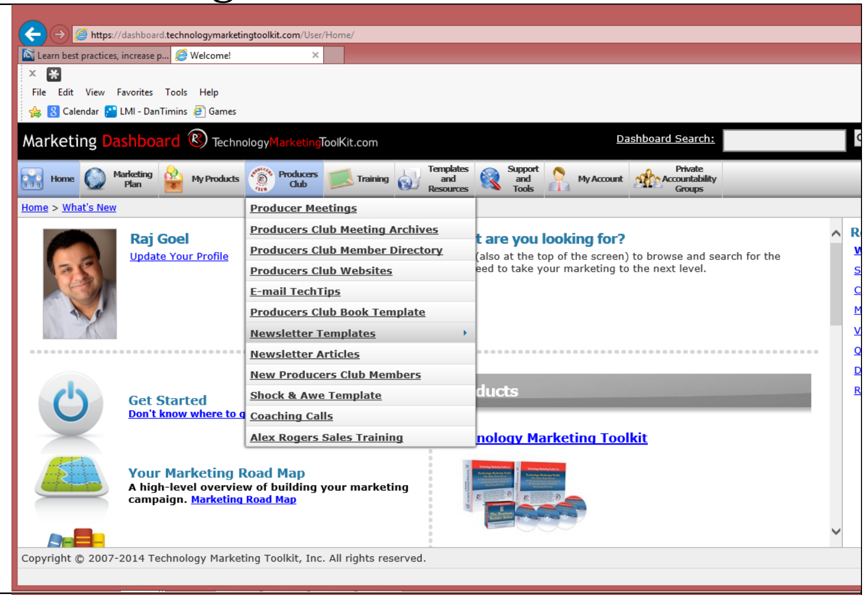
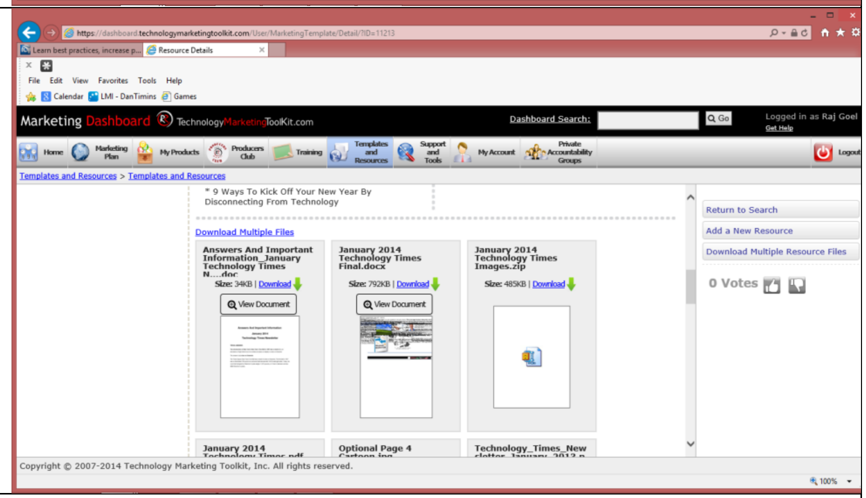
Dan Williams, CFO
E W Howell
Industry: Construction

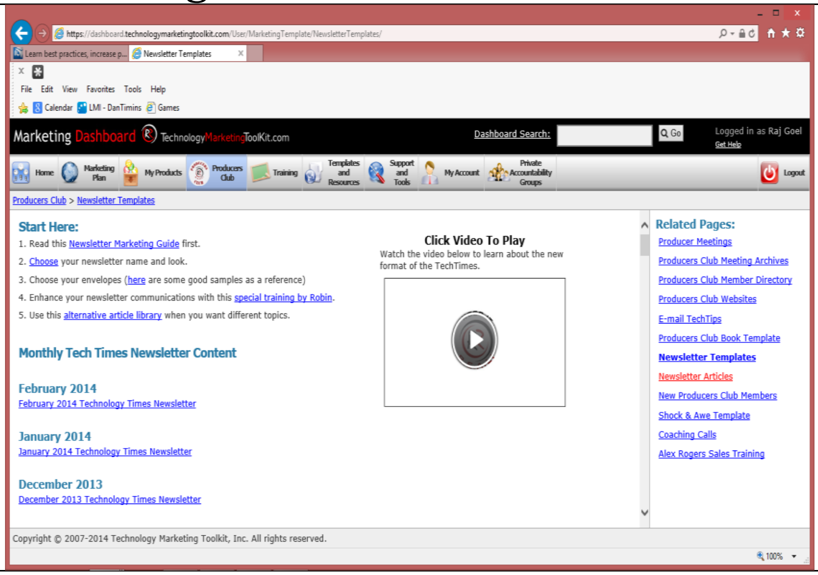
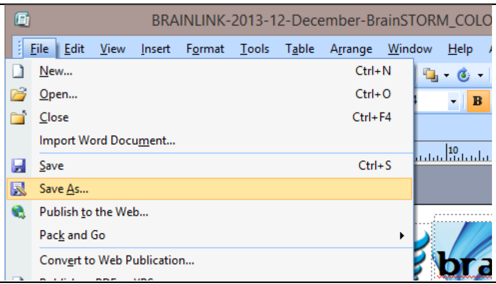
Client
Of The Month

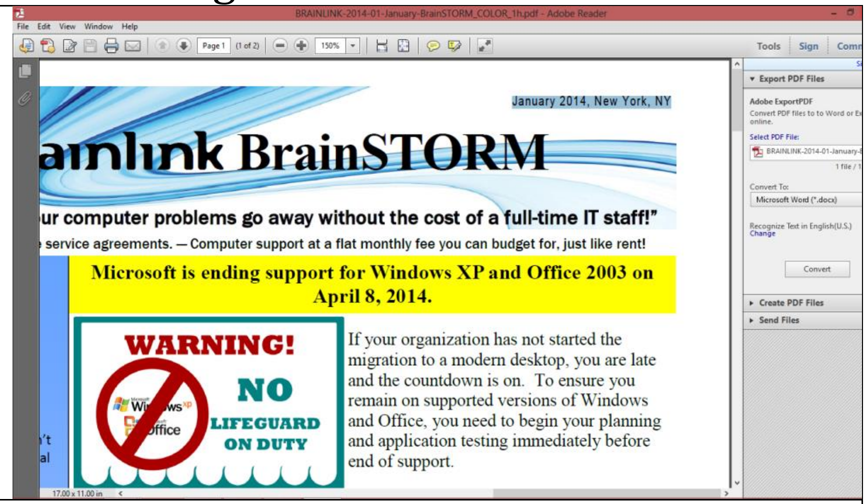
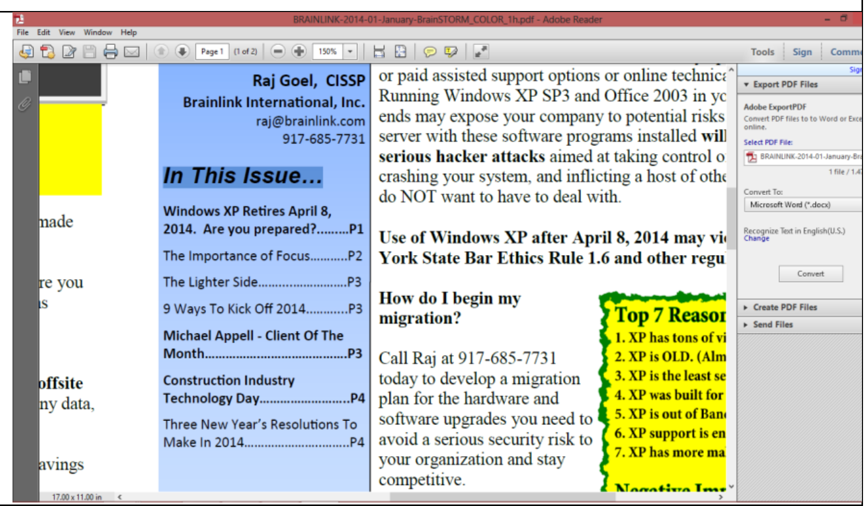
brainlink
You run your business and leave the IT to us

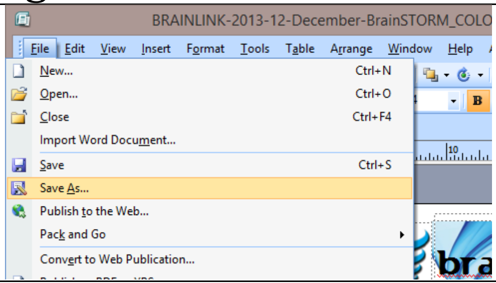
6) SOP – Create Monthly Newsletter

Step	Description	Screenshot
Process: Monthly newsletters are created by the end of each month and emailed to the printer by the **10**th of the following month. Once the final version of the newsletter is sent to the printer, it is also emailed to Pronto for posting on www.brainlink.com.		
1.	Log in to: https://dashboard.technologymarketingtoolkit.com/User/Home/ to pull Robin Robin's latest newsletter for content ideas.	

2.	On main menu, go to **Producer's Club** and scroll down to and click on **Newsletter Templates.**	
3.	Download a copy of Robin's newsletter. Email the copy and your article suggestions to Raj for approval.	
4.	Also ask Raj if he is going to write a cover article for the newsletter.	

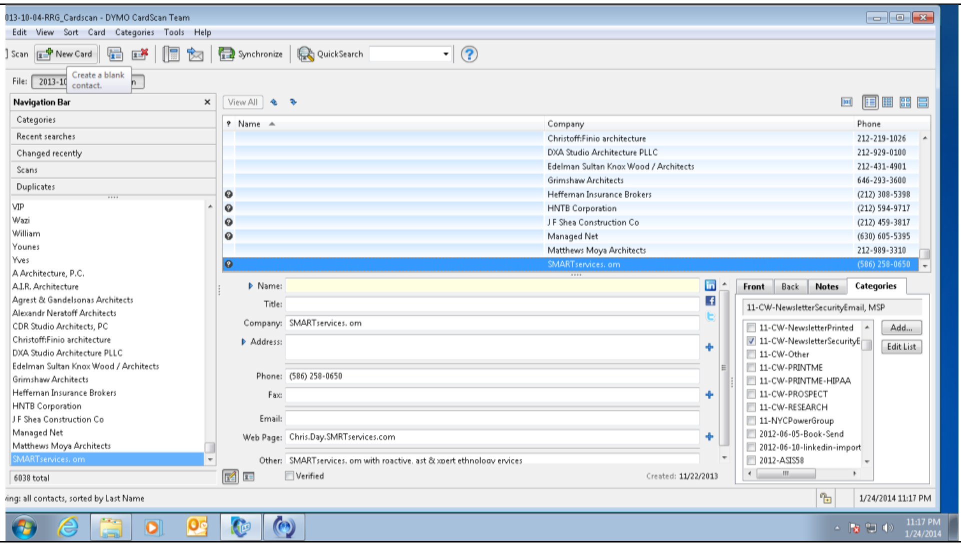
5.	Another source for articles from Robin: https://dashboard.technologymarketingtoolkit.com/User/MarketingTemplate/NewsletterArticles/ Located on the side menu under **Related Pages**	
6.	Once the content is approved and finalized, proceed with the layout of the newsletter.	
7.	Go to **\ownCloud\Shared\Marketing\Newsletters**	
8.	Open the Publisher file of the last version of the previous month's newsletter	
9.	Save the file for the following month with the following naming convention: BRAINLINK-Year-Month-Month-BrainSTORM_color_ Ex: *BRAINLINK-2014-01-January-BrainSTORM_color_v1*	

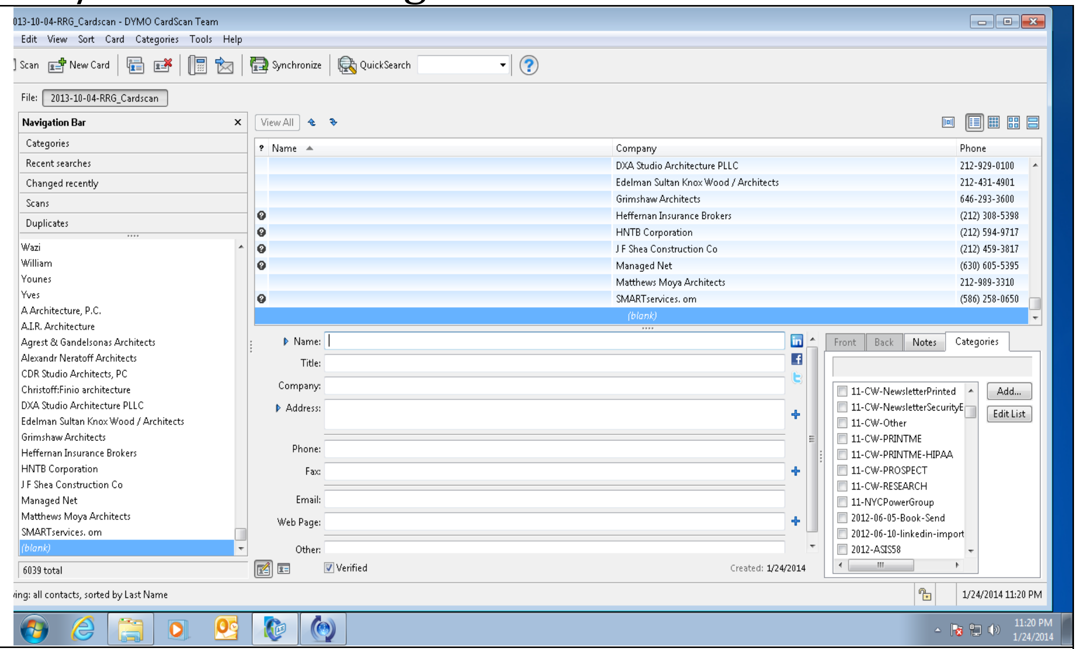
10.	Change the month on the cover page to reflect the next issue	
11.	Delete articles from previous month's newsletter; keep format intact	
12.	Copy and paste the approved articles into the newsletter columns; format as necessary	
13.	Proofread newsletter **thoroughly** and revise as necessary	
14.	Revise **In This Issue** on Page 1 to indicate where the articles are located in the newsletter	

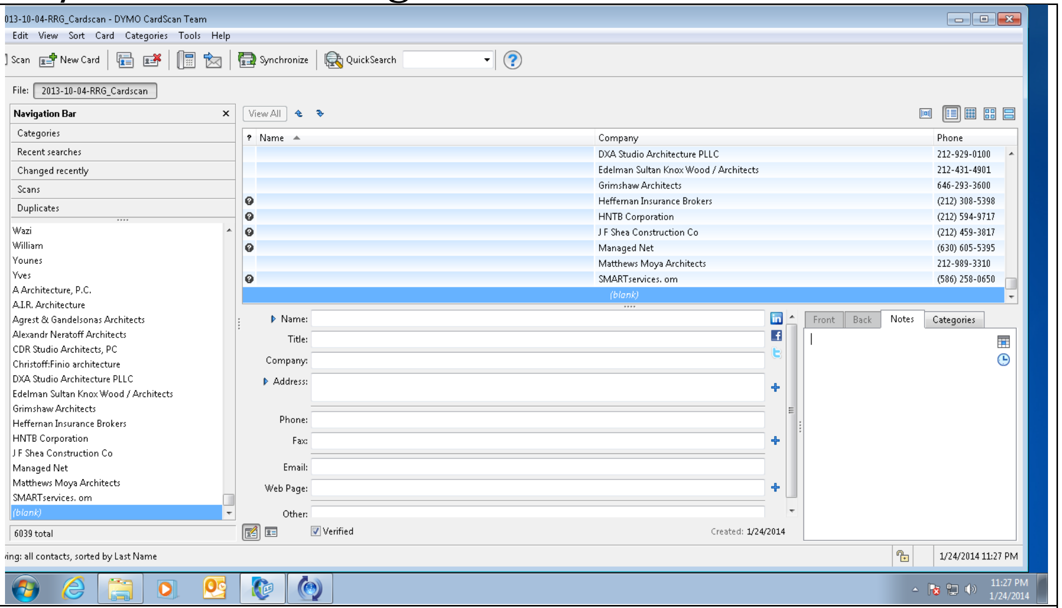
15.	Save newsletter as Publisher file and upload into ownCloud	
16.	Inform Raj that the newsletter has been laid out for his review and approval	
17.	Once newsletter has been approved: a. Save newsletter as PDF file b. Generate a csv file of the mailing list from Cardscan c. Generate an envelope template in Word d. Forward the newsletter publisher and pdf files, mailing list and envelope template to Autopilot Marketing for printing and mailing e. Forward the pdf files to Pronto for posting on www.brainlink.com	

7) SOP – Handling Returned Newsletters

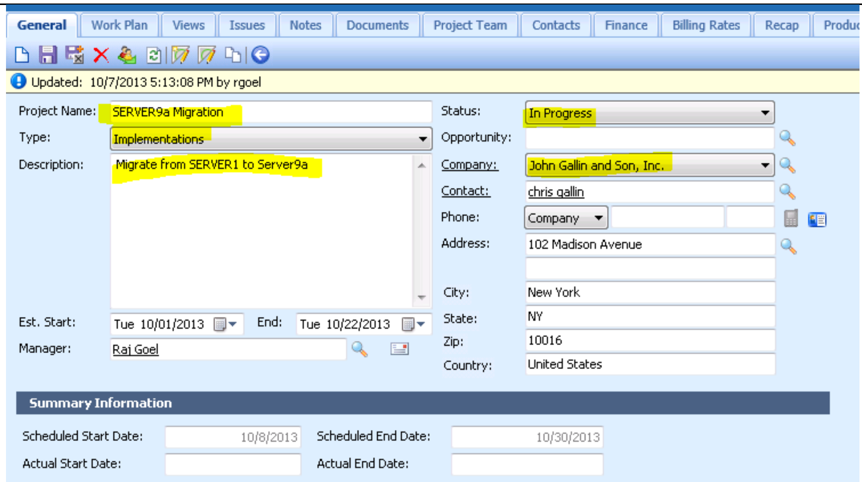
Step	Description	Screenshot
Purpose: To determine why a monthly newsletter was returned to Brainlink.		
1.	When monthly newsletters are returned, Sharon will compile them for investigation.	
2.	Go to the database and copy the addressee's company URL.	
3.	Open a browser and paste the company URL.	
4.	Go to the **Contact Us** page on the company site to verify the mailing address.	
5.	If the address on the site is different from what is in the database, revise the address in the database.	
6.	Depending on the firm, go the tab for principals/attorneys/the management team to determine if the addressee is still at the firm. If still at the firm, go to step 8.	
7.	If the addressee is listed and his/her direct email address is available, copy and paste or enter it manually into the database.	
8.	If the addressee is not listed as a principal/attorney/management, call the firm/company to verify if that person is still with the firm.	
9.	If the addressee is no longer with the firm/company, ask if he/she has been replaced. Get the new person's name, title, direct email address and phone number and enter the information into the database	
10.	Ask if the receptionist if he/she has new contact information for the former employee.	

11.	Contact the new employer to confirm that the person is at this firm/company, get the person's new direct phone number and email address. Get the firm's address from the receptionist or from the firm's website.	
12.	Create a new card in the database to enter the new contact information.	
13.	To create a new card in the database, open **Cardscan**.	
14.	Click on the button **New Card** in the menu.	

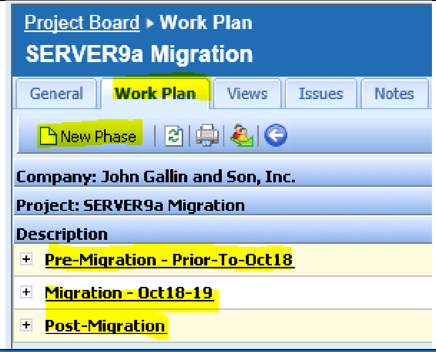
15.	Go down to the blank fields and enter the new contact information.	
16.	Go to the **Categories** tab to the right of the contact information and click the appropriate categories.	

17.	Click on the **Notes** tab on the right and the appropriate notes about the contact including the date (Ex: 2014-01-24 BW entered into the database; contact was previously at XXXXX)	
18.	If the contact's previous position has not been filled, delete the card from the database.	
19.	Click the close button and the new information will be saved automatically.	

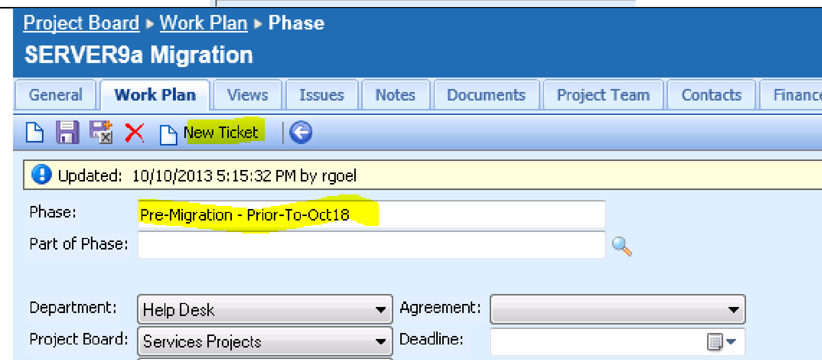
8) TECHNICAL SOP – How To Create A Project Plan In ConnectWise

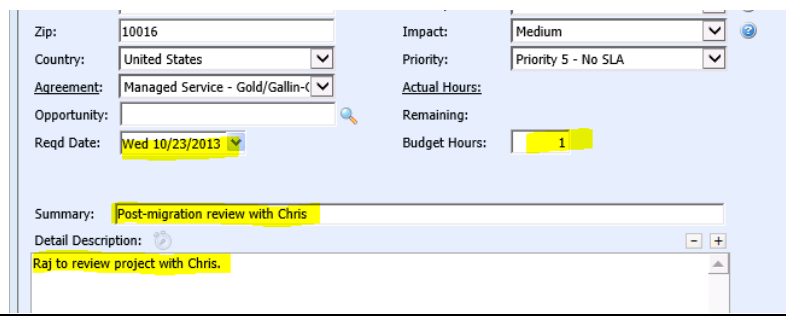
Step	Description	Screenshot
1.	Log on to ConnectWise either through the Desktop App or at https://YOURURL.myconnectwise.net	
2.	Navigate to PROJECT -> PROJECT BOARD	
3.	Select NEW Project	
4.	Name the project, assign it to client	
5.	Save the project	
6.	Click on WORKPLAN	

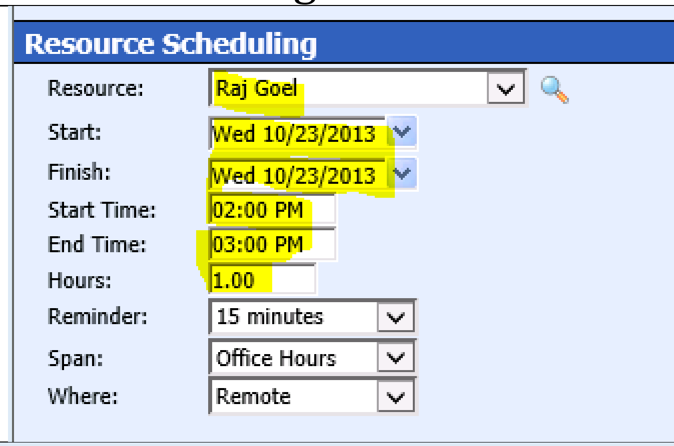
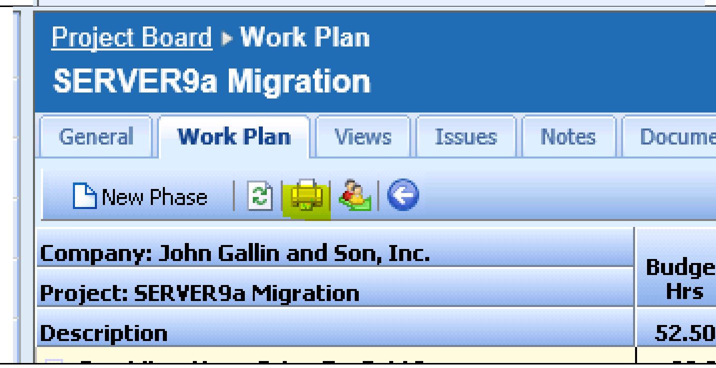
7. **ADD** at least 3 phases – **PRE-…; DURING….; POST-…**



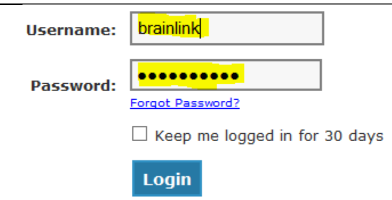
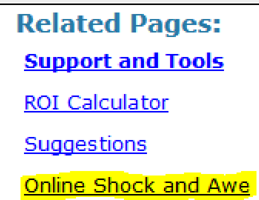
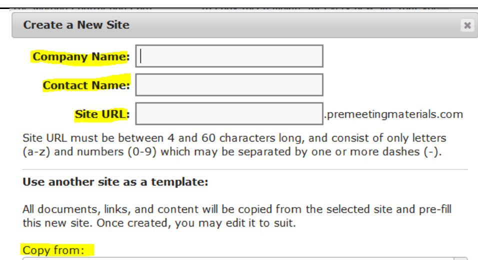
8. Click on EACH PHASE, and ADD Tickets





9.	Assign TECH, start date, time. **Assign AUTOMATED & NOC tasks to SERVICE DESK** user	
10.	Once ALL tasks have been added, time budgets added, etc, go to the WORK PLAN and SAVE AS PDF	

9) SOP - Creating on Online Shock and Awe

Step	Description	Screenshot
Purpose: To create a personalized Online Shock and Awe presentation that can be used as a marketing tool or as an invitation to a Brainlink event.		
1.	Login to the Dashboard: **https://dashboard.technologymarketingtoolkit.com/User/Home/** Username: brainlink - Password: XXXXXXXXXX	
2.	Go to the Support and Tools tab on the homepage.	
3.	Select **Online Shock and Awe** on the right**.**	
4.	On the right hand side of the page, select **Create New Site**.	
5.	Enter Company Name.	
6.	Enter First and Last name of prospect.	
7.	URL will be automatically generated, but you will need to correct it with just the company name and first name of prospect without the dashes (Example: : http://constructionriskpartners-joe.premeetingmaterials.com/)	

8.	Choose a template to copy from the drop down menu (Choose do not copy-create new site only if necessary).	
9.	The logo and business card information are already plugged in. Edit the letter portion of the site	
10.	The letter portion will be created to be personally addressed to the addressee. The language will be edited to the event that is currently being created.	
11.	Select **Edit** next to letter text and add the appropriate language.	
12.	Click **Save** at the bottom of the **Edit Letter Text** box.	
13.	Select **Render** to ensure the site renders properly.	
14.	Select **Edit** next to video link to edit the video portion of the Shock and Awe. (The video link that will be attached to the site, must be taken from the embedded code provided on YouTube.com)	
15.	To get this you must first search for the video, locate the share tab and then select embed.	
16.	Copy the embed code and paste into video link portion of the Shock and Awe site.	
17.	Click **Save** at the bottom of the **Edit Video Link** box.	
18.	Select **Render** to ensure the site renders properly.	
19.	For the files that need to be attached, you must select **Edit** next to the files portion and upload a new file.	
20.	Click **Select File** and choose the desired file to be uploaded.	
21.	Edit the file title, and then click **Save** at the bottom of the **Free Report Document** Box.	
22.	Select **Render** to ensure the site renders properly.	
23.	Click on the **Share** button at the beginning of the page to send a test email to yourself.	
24.	Copy the highlighted URL and paste into your email account to email to yourself and preview the site before continuing.	
25.	After you have finished creating the desired site, save **Name** of person, **Company** name, and **URL** that the site created for you on a separate document for future use.	