WORKSHOP
DELIVERING CRM INDEPENDENT OFFERINGS

WORKSHOP OVERVIEW

OVERVIEW

What is a CRM Independent Offering and how does it work?

FEATURES

Let's explore features and recommended tools for this workflow.

BUILD

Let's build a CRM Independent Offering.

Q&A

What questions do you have about delivering a CRM Independent Offering?

NEVER MISS A WORKSHOP

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WHAT IS A CRM INDEPENDENT OFFERING?

CREATED IN ACCESSALLY

Everything is created in AccessAlly from order to delivery.

OFFERING RELEASE TIMERS

Release timers control when modules are delivered to your users.

ACCESSALLY EMAILS

You send transactional emails like welcome emails and module release emails.

DOES NOT USE A CRM SYSTEM

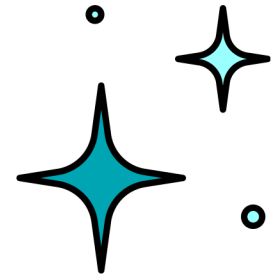
From order to delivery a CRM system is not used (even if you're connected to one).

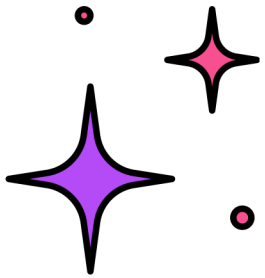
ADVANTAGES

1. Eliminates the need for webhooks which can fail
2. Tagging happens within AccessAlly
3. Setup is less error prone
4. Less time and work to create
5. Everything happens in AccessAlly

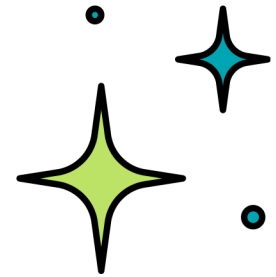
DISADVANTAGES

1. Need the Fluent SMTP plugin to ensure email deliverability
2. Anything “dated” requires a quick manual step
3. Timers are “number of days between” versus a specific date.





BUILD



TEST

THANKS FOR WATCHING

VISIT THE ACCESSALLY KNOWLEDGE

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