

Day 1 Agenda

Morning

1. Terminology
2. Setting up – picking primary and comparisons
3. Getting started & navigation
4. Basic customizing –
 - a. Moving built in displays to “my displays”
 - b. Chart options
 - c. Exporting & sharing

Lunch

Afternoon

5. Data sets
 - a. 5300 call report
 - b. most commonly used accounts – Top 100
6. Custom peer groups
7. Custom displays

Day 2 Agenda

Morning

1. Recap from yesterday
2. Functions
3. Custom peer group building
 - a. advanced tabs
4. Custom graphing
 - a. Detailed
 - b. Benchmarking
 - c. Distribution
 - d. Correlation
 - e. National Trends

Lunch

Afternoon

5. Scoring Systems – CUPP, ROM
6. Custom formulas
7. Exporting & sharing