

# Training Overview

SCORE Headquarters will train Chapters and Volunteers directly

Engage is our brand new CRM system that will be fully implemented by the end of 2021 in all chapters. A Client Relationship Management (CRM) system is a technology for managing all your relationships and interactions with Clients and Volunteers. The system is built on industry-leading, modern Salesforce technology that is designed to be intuitive and mobile-friendly.

## Training Methods



### Live Virtual Training Sessions

Live virtual training sessions will be delivered to Chapters and Volunteers directly. These role-based trainings will be delivered within one month of being onboarded to SCORE Engage.



### Recorded Trainings

Recorded versions of live training sessions and 'How To' videos will be available online, offering flexibility for those who cannot attend the live sessions.



### Walk Me

A step-by-step guidance delivered within Engage without requiring the user to leave the screen. These smart walk-throughs will be specific to each user's role, tasks, and actions.



### Knowledgebase Articles

Self-service library of information on how the process & system work. This will include FAQs, How To guides, Quick Answer resources to common questions and issues and other relevant information.



### Support Team

The SCORE Support Team will be ready to answer your questions. However, please direct your members to leverage the learning resources described here before contacting Support. You can email questions to [engage@score.org](mailto:engage@score.org).

Recorded trainings and Knowledgebase articles will be available in the Support Center.

## Training Roles

### SCORE HQ Training Team

- Creation of all training for Chapters and Volunteers
- Delivery of all training as outlined above
- Provide support for questions and feedback from the field

### Chapter Engage Training Coordinator

*Estimated time commitment: 2-4 hours per week*

- Help chapter leaders to connect with learning opportunities related to business policy and process
- Orient chapter members to the right training opportunities for their roles



## Training Schedule

Live training sessions will kick off in July 2019 with *Preparing for SCORE Engage: The Highest Impact Business Rule and Process Changes* webinars. Role-based training on the new system aligns with the rollout schedule.

### REGISTER NOW:

Register for *Preparing for SCORE Engage: The Highest Impact Business Rule and Process Changes* on [help.score.org](http://help.score.org).

**Thurs. July 11**  
2-3pm ET

**Tues. July 23**  
2-3pm ET