

PROLOG ▶



Meridian Professional Services

# Prolog Essentials & Sales Training

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## Who Should Take This Course

This course provides an understanding of key Prolog features and the tools necessary for leading a successful sales engagement. It is designed for new and existing partner sales employees and new Meridian sales employees who need to understand:

- The benefits of using Prolog
- Options for business applications
- Configuration capabilities
- The phases of a sales engagement
- The key elements of an effective Prolog sales presentation
- Standard product positioning and messaging

### Prerequisites

- An understanding of the AEC industry
- Basic computer skills
- Experience in direct or inside sales
- Read *Demonstrating to Win!: The Indispensable Guide for Demonstrating Software* book by Robert Riefstahl
- Read *Construction Management Jump Start* book by Barbara J. Jackson

## What You Will Learn

This Prolog Essentials and Sales Training course will provide you with a solid understanding of Prolog value, how to navigate within it, and how to use its business applications to increase efficiency, auditing, reporting and collaboration on any project. The course is focused on the first three phases of the Meridian Sales Process: Qualification Management, Requirements Gathering and Account Strategy. This is a combination of lecture, demonstration, hands-on practice, and discussion of how to effectively manage the sales process. You will learn how to qualify Prolog sales engagements, how to effectively position Meridian products and how to focus on critical sales activities that maximize your company's resources and time. You will be given tools to streamline the process of learning what's important to your prospective clients, allowing you to design a solution that best fits your clients' organizations. You will also have the opportunity to ask questions and share ideas with fellow course attendees and peers.

### Objectives

After completing this course, participants will be able to:

- ✓ Understand the business value of Prolog Manager
- ✓ Navigate Prolog with Confidence
- ✓ Use Main Features of Prolog Manager
- ✓ Put Prolog Knowledge Into Action
- ✓ Understand and manage the first three phases of the Meridian Sales Process
- ✓ Achieve Part 1 of Meridian Sales Certification
- ✓ Put sales training knowledge into action

## Topic Descriptions

### Prolog Essentials

#### Key Features Overview

Trainees will receive an introduction to each Prolog feature and understand important software components including deployment options, configuration and maintenance tools and database strategies.

#### Access and Navigation

Trainees will get the opportunity to navigate within the software and learn how to search the online Help.

#### Exploring Key Features

Key features will be explored with hands on exercises. Features include:

- Company Setup
- Bid Packages
- Requests for Information
- Meeting Minutes
- Drawings, Submittals and Transmittals
- Punch List
- Budgets
- Potential Change Orders
- Change Orders
- Contracts

Multiple productivity tools will be highlighted throughout the hands on exercises. Tools include:

- Dunning Letters
- Wizards (Bid Notices and Punch List)
- Quick Print
- HotLists
- Distribution Lists
- Auto Alerts
- Prolog Today
- Word Processing
- Messaging – E-mail

#### Configuration Capabilities

Trainees will get the opportunity to create new users, edit field labels, set global options and create a project template.

## Typical Agenda

This class is a combination of lecture, demonstration, hands-on practice, and discussion of how concepts and features learned will apply in the business workplace. Each class day includes breaks and lunch, resulting in a daily in-class time of approximately 7 hours.

<p><b>Day One</b></p>	<p><b>Introduction</b></p> <ul style="list-style-type: none"> <li>○ Meridian Organization and Market Overview</li> </ul> <p><b>Prolog Product Training</b></p> <ul style="list-style-type: none"> <li>○ Introduction</li> <li>○ Access &amp; Navigation</li> </ul> <p><b>Exploring Key Features with Productivity Tools</b></p> <ul style="list-style-type: none"> <li>○ Company Set Up and Dunning Letters</li> <li>○ Bid Package and Send Bid Notices Wizard</li> <li>○ Requests for Information and Quick Print</li> <li>○ Meeting Minutes with HotLists and Distribution Lists</li> <li>○ Drawings, Submittals and Transmittals with Auto Alerts and Prolog Today</li> <li>○ Punch List and Punch List Wizard</li> </ul>
<p><b>Day Two</b></p>	<p><b>Exploring Key Features (Continued)</b></p> <ul style="list-style-type: none"> <li>○ Cost Control Overview</li> <li>○ Budgets, Contracts and Financial Reports</li> <li>○ Change Management and Word Processing</li> </ul> <p><b>Configuration Capabilities</b></p> <ul style="list-style-type: none"> <li>○ Security</li> <li>○ Nomenclature</li> <li>○ Global Options</li> <li>○ Portfolio Manager</li> </ul> <p><b>Prolog Converge Product Introduction</b></p> <ul style="list-style-type: none"> <li>○ Product Positioning</li> <li>○ Access and Navigation</li> <li>○ Workspaces</li> </ul> <p><b>Next Steps</b></p> <ul style="list-style-type: none"> <li>○ Resources</li> <li>○ Action Items</li> </ul>

<b>Day Three</b>	<b>Sales Training</b> <ul style="list-style-type: none"><li>○ Key Messaging</li><li>○ Segment Briefs</li><li>○ ISV Partners</li><li>○ Key Messaging Test</li><li>○ How to Engage Meridian</li></ul>
<b>Day Four</b>	<b>Sales Training (Continued)</b> <ul style="list-style-type: none"><li>○ Sales Demonstration</li><li>○ Phase 1: Qualify</li><li>○ Phase 2: Requirements Gathering</li><li>○ Phase 3: Solution Strategy</li><li>○ Partner Portal Overview</li></ul> <b>Next Steps</b> <ul style="list-style-type: none"><li>○ Resources</li><li>○ Action Items</li></ul>