

iPoint Online vs. Onsite Training

Which is right for your company?

Congratulations! You've signed up to use iPoint for your company to help you better manage workflows. You've joined more than 2,000 users who recognize that they need to finetune their process to help increase business.

But now that you have the software, what do you do? Unlike your word processing program or even QuickBooks, iPoint is a massive application that affects nearly every aspect of your business. From proposals and sales, inventory and warehouse management, service and scheduling, to billing and receivables, iPoint takes the place of multiple pieces of software you may have previously used. And unlike your previous applications, which you probably added one at a time, you are now completely changing most of your software functionality at one time and, as a result, everyone on your team needs to learn a new program.

Don't worry! iPoint has you covered. We have developed a number of training opportunities to meet the needs of you and your staff. And most of them are free! But you will likely have heard us talk multiple times about Onsite Training and wondered, "Is this really necessary? If I can get all of the training I need online for free, why would I pay \$6,000 to have a trainer in my office?"

There are many reasons a company might choose Onsite Training. This whitepaper is designed to help you make an informed decision on how to get the training your staff needs to engage with, what we think, is the most innovative software platform to help run your business.

First, let's look at the free Online options.

Onboarding

When you first signup with iPoint, you will be assigned an Onboarding Specialist, most likely Mark Cygan. Mark will work with you to help you get iPoint setup and teach you how all the various functions work. He will call you more frequently during the setup phase, and then as your team becomes more familiar with processes he'll reach out less and less. The goal here is to get everyone in your team comfortable with their various roles in the software.

Webinars

Part of the Onboarding process includes having you watch a number of webinars. We do these webinars live or prerecorded. Live webinars are great because you can ask questions. You can get feedback to specific processes you might be trying to do. But if you are unable to attend a

live webinar, we have recorded them so you can watch them back at any time, day or night. The downfall here... you can't ask questions directly.

Manual

We also have an online manual baked into the software. Go to the iPoint Support module on the dashboard and you'll find a button where you can click to open the manual. You'll also see a search bar where you can type in the topic you want to research and find details very quickly.

University

Also in the iPoint Support module is a series of short videos and tests that cover a majority of the iPoint functionality. These videos will describe most of the mouse clicks and options available to you throughout the software.

Support

And of course, you can call or email our award-winning support team. We have specialists standing by to help answer your questions about processes and problems you may encounter. We make every effort to respond to your questions within 15 minutes. So, even if the answer takes a bit longer, you'll know we are on the case.

Onsite Training

By now you are probably thinking, it looks like I have everything I need right in the free Online options. Why would I even think about the Onsite training iPoint offers?

The truth of the matter is, our online team is managing multiple new iPoint installations at any time. As of the writing of this article, there are 66 companies (we call you Community Members) that are somewhere in the onboarding process. And this doesn't count the myriad of Community Members who have been users for a while that review things with some of the support mechanisms we have in place.

Due to a large number of implementations going on at any given time, we just don't have the time to delve deep into your business practices to fully understand the subtleties of your business. Now, we've written the software based on industry best practices and nearly every Community Member who starts down the path finds that the software truly does streamline their business and ultimately make them more profitable. In fact just last week I had a Community Member from Oregon tell me that they had just completed their best year ever and credit iPoint with that success. They were able to develop better processes that made them more efficient so they could handle more business.

But that doesn't take away the fact that your business is complex. And while we've built the software to deal with a number of complex and unique operating situations, there is no way that

our online team can completely understand the way you do business to perfectly fine-tune the software for you in short 30-minute phone calls. So, if you are willing to try to set things up on your own and call in for the occasional tip and trick... you can probably get up and running on your own.

However, if you want us to do a deep dive into your processes and make sure that we've perfectly matched iPoint to your business. You need an Onsite training.

So what is involved with an Onsite training? This 3 or 4-day process starts with our Director of Consulting and Training spending four to six hours learning about your business. There likely won't be a lot of setup going on here. Dave will come in, ask a *lot* of questions. I mean a **LOT** of questions! This is so he can have a better understanding of the way you work.

Then he'll spend time with your management team tweaking and adjusting how the software works. You will work together to make sure that the software functions like your team does. In some cases, Dave might make suggestions on how to improve your business flow based on experiences he has had with other Community Members as well as his more than a decade experience in the audio video industry. But by the end of the time, he will be able to ensure that the iPoint process perfectly matches your company process.

Finally, your team will be trained on *your* processes through *your* software. Each team member will learn their role with their portion of the software. The training is tailored to your company, using your data, and the processes you have set forth.

As you can imagine, this all takes a lot of time... time that we just can't do online in a few 30-minute phone calls.

The Bottom Line

So, what is the bottom line here? Is iPoint Onsite training a *requirement*? Nope. If you think you are capable of assessing the needs of your company and implementing those into the software yourself, you are more than welcome to do that! And we have some Community Members who opt to do that.

But nearly every Community Member that chooses to do Onsite training find that their implementation process not only goes more smoothly but also takes place in a much shorter length of time.

We want your company to succeed with iPoint. And we want to be sure that your business improves because you've chosen to use our software. So, feel free to use the tools we've provided. We think that Onsite Training is an extremely valuable tool to have in your toolbox, or

we wouldn't offer it! But we don't include it as part of the software purchase because not everyone needs or wants it.

If you have more questions about whether Onsite Training makes sense for your company, please send an email or call Dave. He loves helping businesses succeed and looks forward to helping you walk through this decision process.

Contact Dave by calling support: 800-535-4101

Or email support@ipointsolutions.net - in the line of your email say, "Attn: Dave - Onsite Training"

Don't take our word for it!

Here are some testimonials from a few Community Members who have used the Onsite Training option with their team.

- For us, it was critical and invaluable to have Dave help set up iPoint for our business. I'm confident we are off to a good start.
-- **Donald Soohoo** / Paradyme, Sacramento
- Dave was outstanding at learning how our company flows and showing us how to have iPoint work for our needs.
-- **Eric Barbine** / Acoustic Design, Las Vegas
- There's only so much one can learn with three days of training. We've been in business for 41 years. It takes 3 days just to get used to how we do things. Dave did a tremendous job of dealing with the many personalities while getting us through the training milestones.
-- **Craig Romain** / AVS, New York
- Dave was an amazing trainer who not only effectively got the information across but did in a way that made it engaging! Well worth it! Despite being sick for a day and a half of the training I still feel like Dave was able to train me on what I needed to know and was able to take the time to make sure I had all the information needed (he did not once rush us on time, even if he had to repeat training for me from the time I missed!)
-- **Olivia Gibson** / Elite Media Solutions, Boston
- There were long days and lots of questions. Dave was patient and knows the industry as well as how best to use the software for our company. He was awesome and most importantly, kept us engaged.
-- **Yani Rivera** / Electronic Lifestyles, New York

- Dave was great. Super knowledgeable and very patient. iPoint is overwhelming at first, but once you break it down into pieces it becomes much more manageable. On site training is really the way to go if you want to get iPoint deployed and usable in the most efficient way.

-- **Cheryl Ampel** / Atlanta Audio & Automation

- We wanted our entire staff to be updated and ready to fully onboard the entire iPoint process. The training provided by Dave was very helpful and our entire staff greatly benefited from the time spent with Dave. Two regrets/comments:

#1 - We should have done the on site training much earlier

#2- Wish we would have scheduled one additional day to allow a little more one on one time.

-- **Ed Simonton** / Imagine Audio Video, Nashville