



***FAST*Start CRM DIALER**

UTILITY AUDIT FOCUSED QUICKSTART

Here's a QUICK START sheet
to find all that you need to get dialing as soon as possible.

Recap of Video Call

- We reviewed the Quick Launch Menu, including how to launch the CRM Dialer, request leads, check rates, and locate answers and resources.
- Use the information below to continue navigating the platform. Then move to the QUIZ section and test your ability to find your way around. Applying what you've learned immediately after exposure helps improve retention and confidence.
- We discussed your timeline for getting started in the CRM Dialer, reviewed scheduling expectations, and covered common activity goals.
- Our next session will focus on what a successful virtual call center setup looks like – Master Your Desk & Dialer.

Action Plan

- Week #2 – Master Your Desk & Dialer.
- Memorize 2–3 scripts by reading them aloud, then begin using them in the CRM Dialer as soon as possible.
- Commit to your first day on the phones and finalize your work/office schedule.
- Test your knowledge using "QUICK START" so you can identify what you've learned and where you may need additional review.
- If you would like to revisit the material in more detail, use the links provided below to continue familiarizing yourself with the platform and processes.

My primary goal is to help you get started generating customers and sales. We are happy to assist with script development, reviewing utility bills, and helping guide you through the sales process. Once you receive a bill from a customer, feel free to reach out for the next steps.



Section 1: EASYLINKS

Physical Set-Up

- Your PC or Laptop – Pick the Right Browser
- Headset
- [Check Your Internet Speed](#)

Utility Bill Audit Readiness (use CTRL + CLICK to access links)

- [TruPowurHub.com \(Quick Launch Menu\)](#)
- [TruPowur – Customer Lead Request](#)
- [Available Markets & Services by State](#)
- **TIC Sheet** (See Attached)
- [CRM Dialer](#)
- Your Personal Website for Utility Audits - **XXX.TruPowurOffice.com**
REPLACE the **XXX** with your Three-Digit Extension (Sales Code).
- [Utility Audit Scripts in TruPowur Academy](#)
- [Utility Audit Resources](#)
Available within the **CRM Dialer** under [Documents](#))
- Sample Audit Contract for your review (Do Not Send to Customers)
Available within the **CRM Dialer**
Under: Documents>Utility Audit>[DocuSign Audit Service Agreement](#)
- Understanding Utility Audit Commissions - [Commissions for a Commercial Utility Audit](#)



Section 2: CRM DIALER

CRM & DIALER Readiness

- **Watch the TruPowur Academy session on the CRM DIALER**
[See the CRM DIALER in ACTION](#)
- Log in to your [CRM DIALER LOGIN](#)
Use your 3-digit Sales Code (the same 3-digits as your Extension) with your Password
- **In the CRM DIALER – Navigate to MY LEADS**
- In the CRM DIALER, open a CONTACT, find the **MAIN NUMBER** field, look for the green handset icon to the right, and click the Phone Icon to dial
- Within a CONTACT, find the **EMAIL** field, click on the Mail icon on the right to launch the email function (NOTE: an email must be in the field to use this feature).
- **DO NOT MODIFY TEMPLATES.**
If you have a template you'd like, please email Support@TruPowur.net
- DO NOT USE ANY of the ACTIONS items like **DELETE FIELDS.**
- Check your Call Volume for the Day – Week – Month using **TOOLS>Dialer Metrics**
- Check your email metrics for the Day – Week – Month using **TOOLS> Email Metrics**



Section 3: QUICK LAUNCH MENU

TruPowurHub.com (use CTRL + CLICK to access links)

- [Average Price of Electricity](#)
- [ALL-IN FIXED-RATE Calculator](#)
- [Understanding the ALL-IN FIXED-RATE](#) – Important to Understand
- Early Techniques for Cold Calling Success - [Getting Past the Gatekeeper](#)
- Qualifying Customers - [Red Flags to Watch Out For](#)
- What Exactly IS a Utility Audit? - [Understanding a Utility Audit](#)
- Find out about ALL commissions on the [Quick Launch Menu](#)
Under COMMISSIONS in the lower left-hand section
- Understanding the long-term [All Markets Sales Cycle](#) of the Power Consulting Business
- Key Contact Information – Reach Any Department from [CONTACT](#)
- All about our award-winning, weekly Training – [ZOOM Training Dates & Times](#)
- Access video training on demand through [LEARNING](#) in the TruPowur Academy Portal

TruPowur Academy

- Use your credentials to log into TruPowur Academy to access all of our TruPowur Training, plus additional and advanced course materials, and more!



QUIZ - Use this list to test yourself by locating the items in the list

1. Accessing Email
2. Leads Request
3. Scripts
4. CRM Dialer – My Leads
5. Scripts in the Dialer
6. Call recordings
7. Personalized email templates
8. Call and Email Metrics
9. Current Lead Status
10. Current Lead Status
11. Commissions
12. Fixed Rate Calculator
13. All-in Details
14. TruPowur Academy