

SENRO

SENRO Training Courses and Content

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SOLUTION4
POWERING YOUR BUSINESS INTO THE FUTURE

SENRO – Training Courses and Content

This document is designed to provide you with an overview of the training courses both available and required to get the most from SENRO. Whilst we believe that SENRO is a very easy to use system, you will want to ensure that you get full value from its use.

When taking SENRO for the first time, there are 3 Training courses required. Onsite training is performed in class sizes of no more than 8 people per session.

1. Initial Set-up and configuration
2. Beginners training
3. Advanced Commission training

Each of these courses is detailed below together with the delivery method and cost.

Training: Initial Set-up and configuration training 3 hours online

This session covers the configuration sections of SENRO. It is designed for Practice Principals and Super Users. Staff will not need to be involved in this session as it covers many areas where they will not have access too.

Content includes the following:

Staff profiles	Company profiles	Access rights	Letter and marketing templates
Company commission rules	Staff commission rules	Introducer commission rules	Sources

Beginners Training – 1 day onsite (based on no more than 8 people per session)

This Session is for all staff both admin and advisers and covers the everyday use of the system.

Content includes the following:

Entering client and policy information	Diary management	Letters, SMS, document management	Pipeline tracking
Lead management	Third party integrations	Recording commissions and fee expectations	

Advanced Commission Training – 2 hours online

This session covers the advanced use of the commission section of SENRO. It is designed for those staff members that deal with both the reconciliation of commission and the production of all business management reports.

Contents include the following:

Recording commissions and fee expectations	Commission engine for corporate structure - up to 6 tier commission levels	Commission reconciliation - upfront and ongoing fees	Business production reports
Business income reconciliation	Staff payment reconciliation	Introducer payment reconciliation	Staff debt balance management

Optional Training Courses

Marketing – 1 hour online

Client searches	Producing marketing templates	Creating marketing campaigns	Email marketing
SMS marketing			

Refresher Training – Online or onsite

This is a bespoke session designed in conjunction with you to cover any aspects of SENRO. The time allocated to these sessions is dependent on the topics required.

Training costs:

1. Online training charged at £90 per hour plus VAT
2. Onsite training charged at £750 per day plus VAT

All training at the client office will commence at 10:00am and finish at 4:30pm. A detailed training manual is provided at the training sessions covering all aspects of the training supplied.

To book a training session for your business now please contact us on:

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