

Offered through the Greater Rochester Chamber Academy, this two-day virtual training session, "Optimizing Business Growth," presented by Jill Peterson, Founder & Chief Growth Strategist at Clover Insights, will teach you how to generate quality leads, optimize CRM for campaign success, and strengthen vendor and customer relationships for lasting growth. This comprehensive program is designed to equip organizations with the knowledge and skills necessary to grow their business.

*2 x 2-hour sessions • Register online at [GreaterRochesterChamber.com](https://GreaterRochesterChamber.com).*

## Series Cost:

- Greater Rochester Chamber members [\$275 for One Day | \$500 for Both Days]
- Non-Members [\$350 for One Day | \$650 for Both Days]

A certificate of completion will be provided after the training.

**Questions? [Gena.Stein@GreaterRochesterChamber.com](mailto:Gena.Stein@GreaterRochesterChamber.com)**

## Day 1: Lead Generation and CRM for Business Growth

### Key Concept 1: Lead Generation Best Practices and Tools.

Explore best practices for generating leads, focusing on email and LinkedIn campaigns, and the tools to make the process more efficient and effective.

- **Unleashing Lead Generation Power** - Discover how to identify your ideal customer profile, create engaging content, and use inbound and outbound email and LinkedIn campaigns to attract high-quality leads.
- **Leveraging Technology for Lead Generation** - Learn about crucial tools for successful email campaigns, such as mail warm-up tools to improve deliverability, and how to ensure your emails are optimized with proper DMARC and DKIM setups. Also, explore best practices for LinkedIn outreach to build meaningful connections and generate leads.

### Key Concept 2: Using Your CRM to Maximize Growth.

Ensure your CRM is properly configured to capture the data you need to measure the success of your lead generation campaigns and drive business growth.

- **The Role of CRM in Lead Nurturing and Conversion** - Dive into how CRMs track leads and customer interactions and how to ensure the system captures all relevant data points. Learn how this data helps nurture prospects and convert them into loyal customers.
- **Setting Up Your CRM for Data-Driven Insights** - Focus on configuring your CRM to track the right metrics and key performance indicators (KPIs). Explore how capturing the correct data allows you to measure the effectiveness of your campaigns, monitor conversion rates, and adjust your strategy accordingly.

## Day 2: Vendor Management and Customer Service Excellence

### Key Concept 3: Vendor Management and Customer Service Excellence

Vendor relationships and customer service are critical to sustainable growth. Learn how to optimize both for long-term success.

- **Optimizing Vendor Management for Strong Partnerships** - Explore best practices for managing vendor relationships, focusing on building strong, mutually beneficial partnerships. Understand how clear communication, setting expectations, and regular performance evaluations can help strengthen relationships, negotiate better deals, and improve operational efficiency.
- **Delivering Superior Customer Service for Long-term Success** - Discover how to create a culture of excellent customer service by focusing on proactive communication, empathy, and personalized attention. Learn strategies for managing expectations while delighting the customer, handling feedback, resolving conflicts effectively, and exceeding customer expectations to foster loyalty and long-term relationships.



**Jill Peterson**  
*Clover Insights*

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Over her 25-year career, Jill has helped transform businesses and organizations in a wide range of leadership roles across finance, operations, marketing and sales, talent management, mentorship and coaching, client management, and strategic planning. As an Operations Executive and Positive Intelligence Coach, she has yielded impressive profitability growth and the development of talent of all of those around her. Her comprehensive operational strategies and execution of innovative solutions consistently exceed the goals of the organizations and individuals who entrust her. She leverages data to drive decisions that streamline operations and increase productivity, while also growing client satisfaction and people

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