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## **Intro Slide**



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## **Agenda for Today's Discussion**



- Understanding VARK Learning Styles
- Visual Learning Strategies

- Auditory Learning Strategies
- Reading/Writing Learning Strategies
- Kinesthetic Learning Strategies
- Implementing a Blended Learning Approach

## **Understanding VARK Learning Styles**



## Introduction to the VARK Model





#### **Visual Learning**

 Visual learners prefer using images, diagrams, and charts to process information effectively and enhance understanding.



#### **Auditory Learning**

• These learners like to hear the information – they prefer learning by Aural & Oral methods (listening & speaking).



#### **Reading & Writing Learning**

• Reading & writing learners learn best when they see or hear the written word.



#### **Kinesthetic Learning**

• Kinesthetic learners prefer hands-on experiences and physical activities to learn and understand new information.

## **Visual Learners**



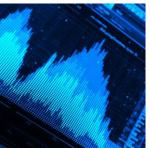
#### **Learning Through Visualization**

Visual learners comprehend information more effectively by visualizing concepts through images and illustrations.



#### **Importance of Diagrams**

Diagrams play a crucial role in helping visual learners to grasp complex ideas and processes.



#### **Charts and Graphs**

Charts and graphs are essential tools that allow visual learners to analyze data and trends effectively.

## **Auditory Learners**



#### Listening

Auditory learners thrive on receiving information through listening, making verbal communication essential for their learning.



#### **Discussing**

Engaging in discussions helps auditory learners process and retain information more effectively than reading alone.



#### **Talking**

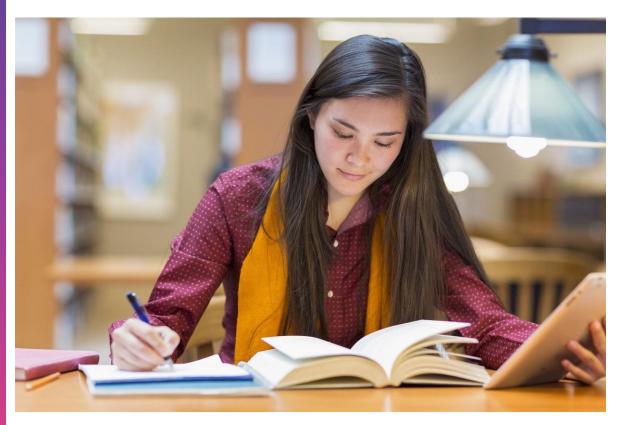
Auditory learners benefit greatly from verbal instructions and find it easier to understand concepts when explained aloud.



#### **Struggles with Visuals**

Auditory learners may find it challenging to comprehend information that is presented visually, such as charts or diagrams.

## **Reading/Writing Learners**



#### **Preference for Written Information**

Reading/Writing learners often prefer to engage with written materials.

#### **Understanding information**

- Lists (numbered or with bullet points)
- Titles & headings
- Online or print reading (books, articles, manuals, handouts)
- Taking notes



## **Kinesthetic Learners**



#### **Learning Through Experience**

Benefit most from hands-on experiences and practical activities that enhance understanding.

#### **Physical Engagement**

Thrive in environments where they can move around and interact with materials physically.

#### **Movement and Interaction**

Often require movement and interactive methods to fully grasp new concepts and ideas.



# Let's illustrate this with a training example

Scenario: Add a new Opportunity in Dynamics 365 Sales



## **Visual Learners**

Sales

Opportunity

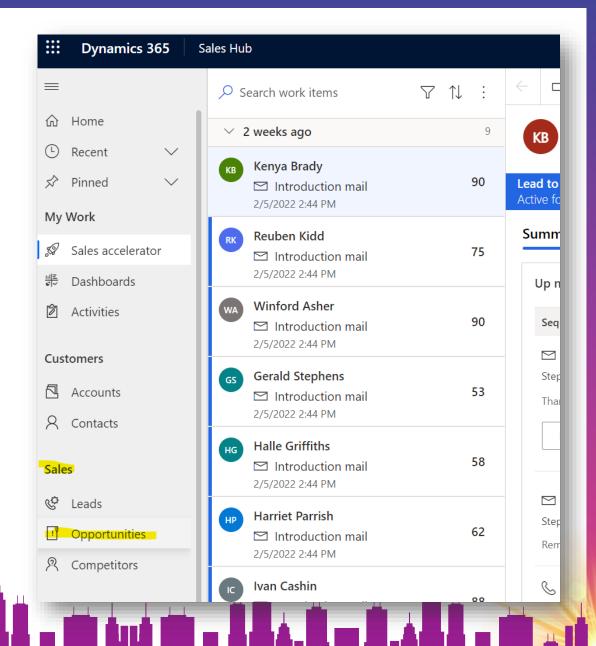
Add New



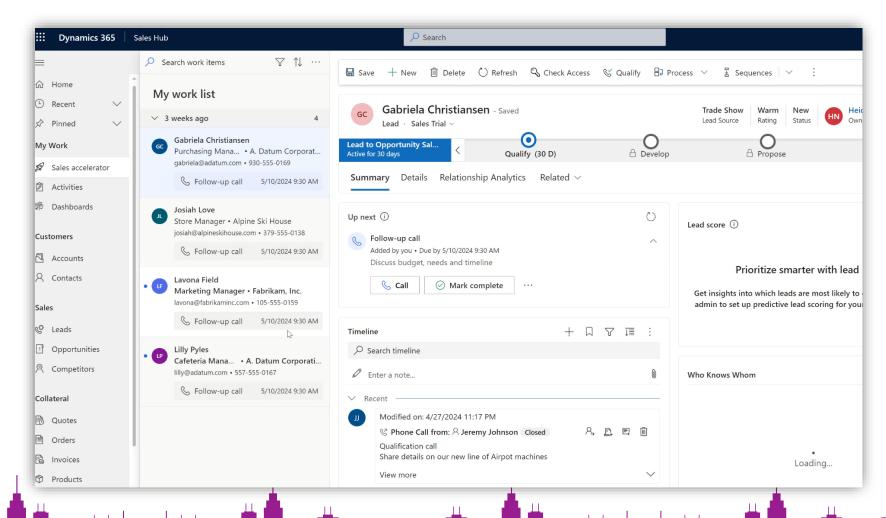


# Reading & Writing Learners

- 1. Open Dynamics 365
- 2. Navigate to the Sales area
- 3. Select Opportunity
- 4. Click + New



## **Kinesthetic Learners**





# Which is your primary learning style?

## Why does this matter?



#### **Enhanced Comprehension**

• Can significantly improve participants' understanding of the material.

#### **Improved Retention**

• Tailoring training to match individual learning preferences leads to better retention of information over time.

#### **Effective Application**

• When learners engage in their preferred styles, they are more capable of applying the knowledge in practical situations.

## What is Multimodal Learning?

Use multiple modes/methodologies to teach a concept to reach your learners.

### **Examples:**

- A CRM training module contains a video, audio, written summary and hands-on lab exercise.
- A case study is used in training using multi-media content (video with images, sounds and text).



## **Benefits to Multimodal Learning**



#### **Higher Engagement**

Learners tend to engage more deeply with the material, resulting in active participation.



#### **Improved Communication & Performance**

Catering to individual learning styles enhances understanding and retention, leading to improved overall performance in CRM tasks.

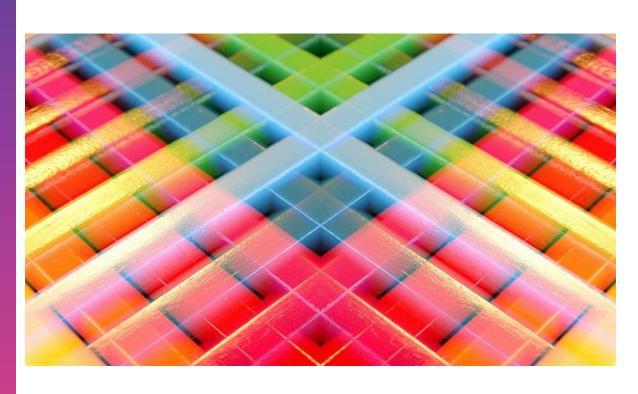


#### **Greater Satisfaction**

# Visual Learning Strategies for CRM Training & Design



## Visual Learners Organize & Emphasize Information



- White Space
- Fonts
- Highlighting
- Layouts
- Underlinin
- Color
- Shapes
- Symbols
- Pictures

## **Effective Visual Training Techniques**



#### **Visual Aids**

Visual learners have a strong preference for visual aids and graphical representations when processing information.



#### **Infographics and Videos**

Incorporating infographics and videos makes information more engaging and accessible for visual learners.



#### **Slideshows for Clarity**

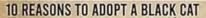
Slideshows help to present information clearly and visually, aiding comprehension and retention.



Visual learners often respond well to the use of colors, shapes, and patterns in learning materials.

## **BLACK CAT KNOWLEDGE**







1. Black is slimming



3. You'll have built-in Halloween 4. Black fur doesn't show up on decorations year-round. dark clothes



5. They don't show dirt as



. They have an understated elegance that must be seen to be appreciated



color YOUR hair is











(of Long Island)

**Bombay Cat** 

Shorthair

Exotic

Shorthair

#### **BLACK CAT SUPERSTITIONS**

BLACK CATS ARE CONSIDERED LUCKY...

- . In Asia and the U.K.
- · If you're dreaming of one
- . If you find a white hair on one
- · If there's a strange one on your porch (which brings prosperity, according to Scottish Lore)
- · If it's walking toward you
- · If it's on a ship

York Chocolate

Russian Black

- · If it's in the audience of a play on opening night
- · If it's given as a wedding present to a British bride (assuming she's ready for a new pet, of course)

- Black cats are considered unlucky...
- · During the Middle Ages (especially for the cats
- If one crosses your path (in the U.S.)
- · If one is walking away from you
- · In animal shelters (black pets are the least likely to

#### 10 BLACK CAT BREEDS

-Tiffany

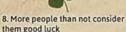
Longhair



6. They match almost every outfit

2. Black is always in style





them good luck



10. They have amazing personali ties and lots of love to share!

Bonus reason: Research has shown that the increased melanism in black cats may make them resistant to illnesses such as feline immunodeficiency virus (FIV). The high levels of melanin in the pigment result in yellow irises and melanism (the opposite of albinism) is most prevalent in male cats.

#### **Creating Visual Aids for** ALL BLACK CATS ARE NOT ALIKE **Training**

Variety of Visualizations

• Use charts, graphs and infographics to help your visual learners.

#### **Summarizing Key Concepts**

• Infographics effectively summarize complex CRM concepts, making them easier to understand.

#### Appealing Visuals

 Attracts attention and enhances engagement with the content.

#### **Accessibility for** Visual Learners

 Visual aids in training caters to visual learners, making information more accessible & easier to digest.



This amazing & distracting infographic is from https://www.amazon.com/Knowledge-Infographic-Posters-Encyclopedia-Plagues/dp/B0B87PJV1H?th=1

## **Incorporating Presentations and Videos**



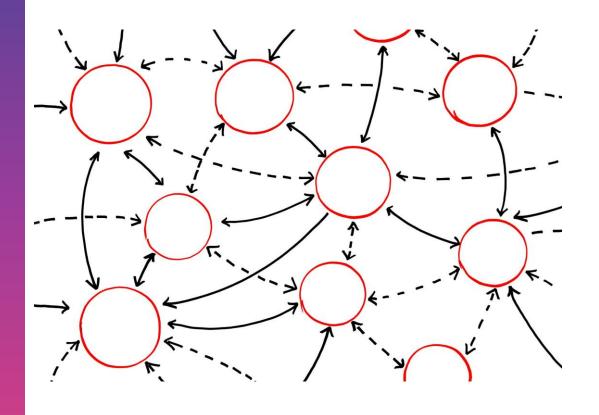
#### **Visual Learning Enhancement**

Presentations & videos help visual learners absorb information more effectively.

#### **Engaging Visuals**

Incorporating engaging visuals into presentations captures attention and increases retention of information among learners.

## **Using Diagrams and Flowcharts**



#### **Simplifying Complex Processes**

Diagrams can break down intricate processes into simpler visuals, aiding understanding and retention for users.

#### **Visual Learning Aid**

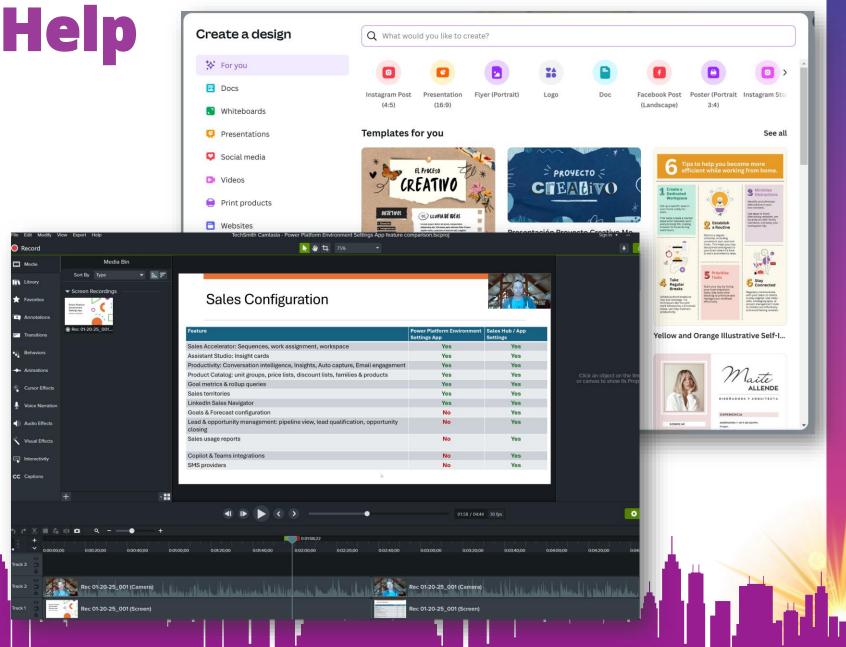
Flowcharts serve as effective tools for visual learners, enhancing comprehension and engagement with the content.

#### **Clarifying Relationships**

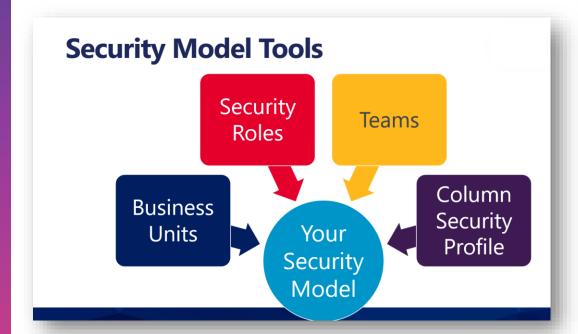
Diagrams help clarify the relationships and interactions between different components within CRM systems.



- Canva (free or paid)
- Camtasia (paid)
- Snagit (paid)
- PowerPoint



## **Examples**



#### **UNLOCK EFFICIENCY WITH** POWER AUTOMATE, **WORDPRESS & GRAVITY FORMS**



**POWERING** 478+ MILLION WEBSITES GLOBALLY



TRUSTED BY 5+ MILLION WEBSITES



**EMPOWERING OVER 10 MILLION** MONTHLY ACTIVE USERS TO STREAMLINE WORKFLOWS

#### STREAMLINE YOUR **CRM WORKFLOW**





#### SIMPLIFY DOCUMENT MANAGEMENT

#### AUTOMATE FINANCIAL WORKFLOWS





#### **BOOST YOUR** MARKETING STRATEGY

READY TO TAKE YOUR WORKFLOWS TO THE NEXT LEVEL? DISCOVER HOW

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#### ALL ABOUT DYNAMICS 365 CRM

New to Dynamics 365 CRM? Here is your Dynamics 365 101 Overview



Microsoft It integrates with the Microsoft 365 stack. Things like Outlook, can all be integrated with Dynamics



#### WHAT IS CRM?

Let's break down the 3 main areas included in Dynamics 365 CRM:

Sales Service And Marketing

#### SALES

In Sales, your team can manage accounts you do business with today, keep tabs on what the people are doing (using Contacts), follow up with leads who have expressed interest in your company, and track opportunities as they are closed as won or lost.



#### SERVICE

In Service, your customer service team can track cases, automatically route and escalate them based on defined criteria, and manage your company's service KPIs, ensuring your customers are satisfied.

#### MARKETING

In Marketing, your team can create campaigns to track ROI, nurture leads and create marketing lists using specifically designated criteria to better target their marketing efforts.



READY TO LEARN MORE? CONTACT REENHANCED TODAY! 215-804-9408

## **Incorporating Visual Elements in CRM Design**



#### **Visual Dashboards**

- Incorporate visual dashboards (especially those you can build using Fabric and Power BI)
- Enhances usability and allows users to quickly interpret data

#### **Charts & Graphs**

- Visualize trends and comparisons
- Improve overall understanding of data

#### **Design & Layout**

- Clean form design
- Get form layout feedback from these learners in workshops

#### **Color, Icons and Graphics**

- Use icons for tables in CRM/model-driven apps
- Add color to option sets
- PCF Controls (out-of-the-box, custom, pcf.gallery)





# Auditory Learning Strategies for CRM Training & Design



## **Effective Auditory Training Techniques**



#### **Importance of Storytelling**

• Engages auditory learners to make concepts easier to remember & understand.

#### **Interactive Discussions**

• Group discussions & collaborative learning environments help learners process & retain information more effectively.

#### **Audio Recordings**

• Audio recordings can reinforce learning by allowing auditory learners to revisit material at their own pace.

#### Music

• Consider adding background music (isn't this lovely?!).



## **Using Storytelling and Verbal Explanations**

#### **Power of Storytelling**

Storytelling is an effective technique that captures attention and makes complex concepts relatable, engaging the audience.

#### **Examples:**

- Case studies
- Customer testimonials
- Behind-the-scene stories
- Day in the life stories

#### Know your audience

- Understand their pain points & aspirations
- Tailor your stories

#### Craft compelling narratives

- Focus on the customer's journey
- Highlight the why not just the what

#### Choose the right storytelling medium

 Presentations, videos, blog posts, case studies, SharePoint intranet

#### Be authentic & transparent

## **Fostering Interactive Discussions**



#### **Engaging Auditory Learners**

Group discussions create an environment to listen & engage actively, enhancing their understanding.

#### **Q&A Sessions**

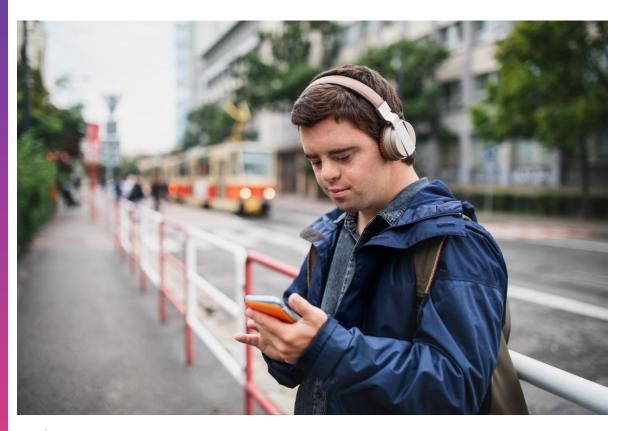
Q&A sessions allow participants to clarify their understanding by asking questions and receiving immediate feedback.

#### **Verbal Interaction Benefits**

Fosters collaboration & deeper insight into the topics discussed.



## **Audio Recordings**



#### **Podcasts**

Podcasts cater specifically to auditory learners, enhancing their understanding of the material through listening.

#### **On-the-Go Flexibility**

Audio recordings provide flexibility, allowing learners to access training materials anytime and anywhere, even while commuting.

#### **Increased Engagement**

The use of audio formats increases engagement with training materials, making learning more interactive and enjoyable.

## Software to Help

Bensound: free music downloads

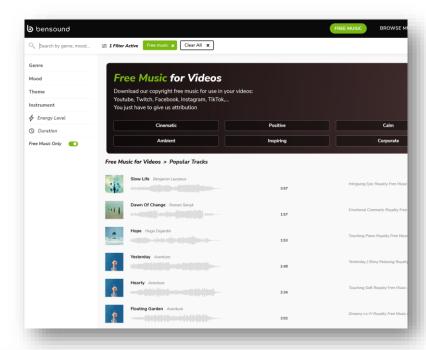
YouTube

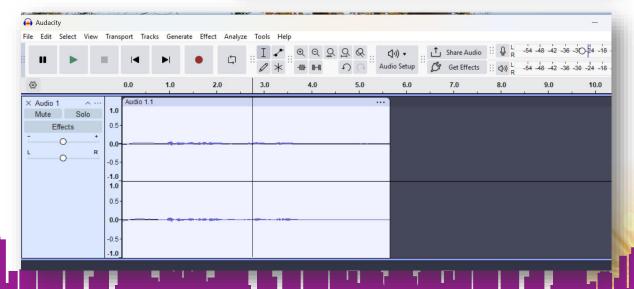
**Teams** 

Zoom

Podcast/audio recorders:

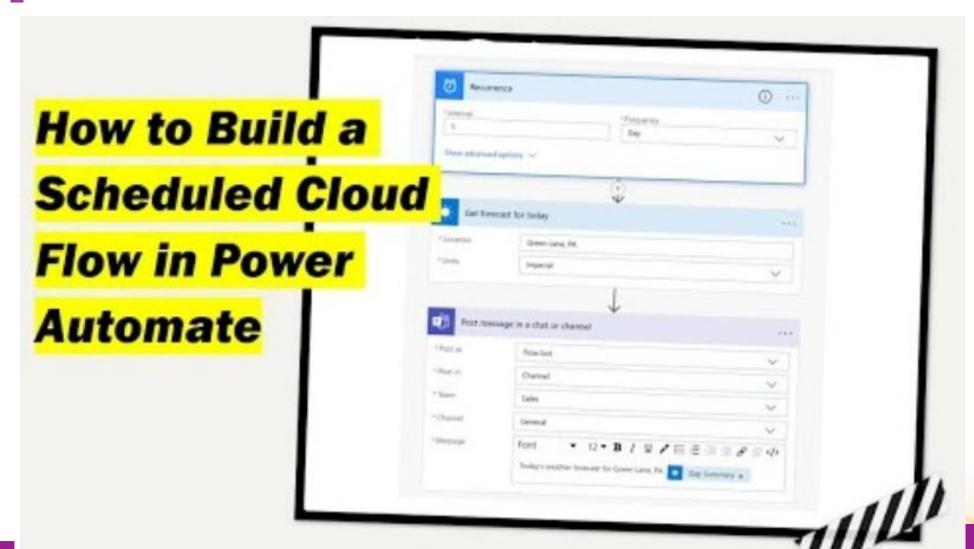
- Audacity (Free): record, edit, mix audio
- Zencastr (paid)
- Riverside.fm (paid)





## **Examples**

#### **CRM Rocks Podcast**





## **Incorporating Auditory Elements in CRM Design**



#### **Audio Notifications (Mobile / Teams)**

- Integrate audio notifications
- Ensures users receive timely alerts and updates

#### **Voice Commands (Mobile)**

- Use voice command features (Siri, Gemini, etc) to interact with systems
- Simple voice to text features can help users with CRM data updates

#### **Feedback**

- Participate in focus groups, workshops or meetings to help capture new CRM requirements.



# Reading/Writing Learning Strategies for CRM Training & Design



# **Effective Reading/Writing Training Techniques**



#### **Written Summaries**

Helps reinforce key concepts and improve retention for learners engaged in reading and writing.

#### **Note-Taking Opportunities**

Encouraging note-taking during lessons provides learners with a deeper understanding and better recall of the material.

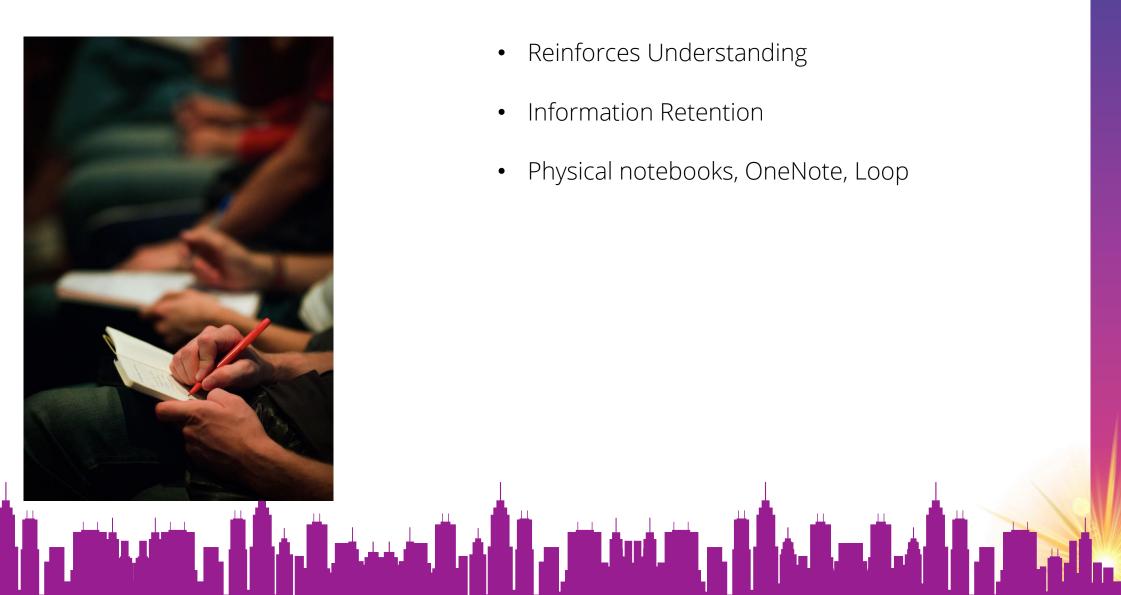
#### **Online Modules**

Online modules that include interactive reading and writing activities can greatly enhance learner engagement and skill development.

### Comprehensive Manuals

Providing well-structured manuals can significantly enhance the learning experience for reading and writing students.

## **Encouraging Note-Taking and Summarization**



- Reinforces Understanding
- Information Retention
- Physical notebooks, OneNote, Loop

# **Using Written Quizzes and Assignments**



## **Application of Knowledge**

Enable learners to actively apply their knowledge in a structured format, reinforcing learning.

## **Evaluation and Feedback**

Quizzes provide important evaluation tools, allowing educators to assess student understanding and offer timely feedback.



# **Providing Comprehensive Manuals and Guides**



## **Detailed Written Content**

Comprehensive manuals offer in-depth information that aids reading and writing learners in understanding complex subjects.

## **Navigating CRM Systems**

Well-organized guides assist learners in confidently navigating CRM systems, enhancing their productivity and efficiency.

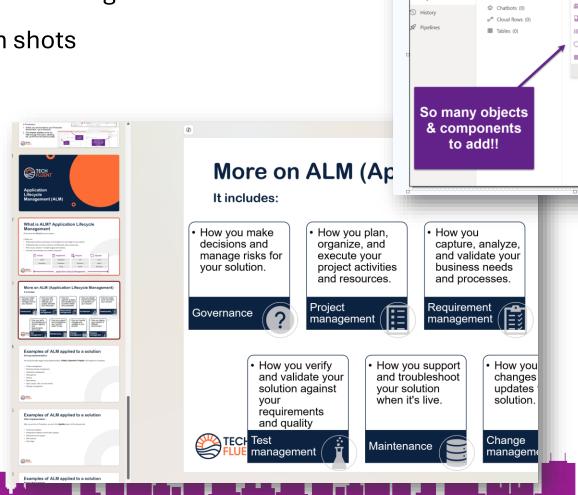
# Software to Help

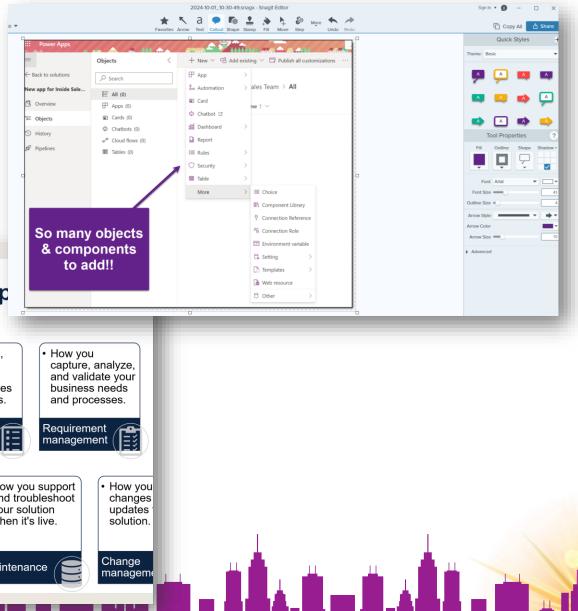
Camtasia (paid): Video editing

Snagit (paid): Screen shots

**PowerPoint** 

Word





# **Examples**

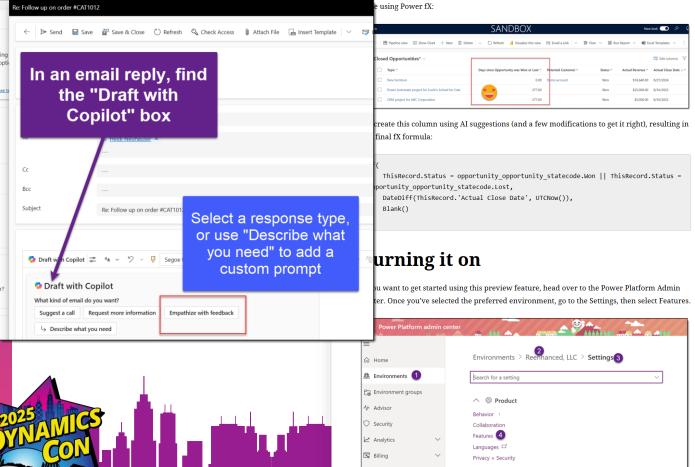
## Using AI suggestions for formula columns

September 11, 2024

Posted By Heidi Neuhauser

AI suggestions for formula columns is a powerful preview feature available to your Power App environment. Since it is in Preview, so it's a great time to play around with it and get to know how it works. This is an environment-level setting, so if you're using more than one environment, you will need to turn it on anywhere you are ready for it.

In the end, we will use natural language prompts to create this new column on the Opportunity

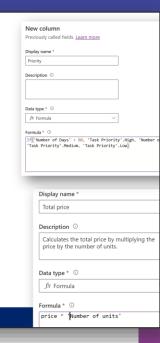


Settings

✓ ≜ Business

## Formula Fields (Power fX)

- Fields display a calculated valued in a Dataverse table
- · Eventually will replace calculated fields
- Type a formula or Get formula suggestions (Preview)
- Limitations:
  - No values when a user with mobile client is offline
  - MaxValue & MinValue column definitions properties can't be set on formula columns



Click Export

Solution.

Save the .zic

file to your

computer

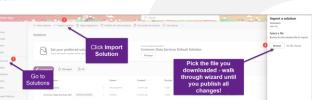
### **Exporting and Importing Solutions**

#### In Sandbox:

- Publish changes and run solution checker if you have not already.
- From the list of solutions, highlight the one you are working on.
- 3. In the ribbon, click **Export solution**.
- 4. Save this .zip file to your computer.

#### In Production:

- Switch your environment to your Production environment > go to Solutions
- Click Import solution at the top. Walk through the wizard, selecting the .zip file from the previous steps.



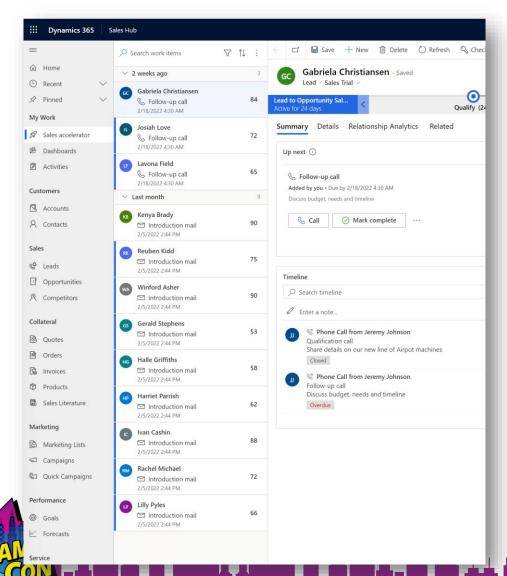
Set your preferred solution

Highlight

solution



# **Incorporating Reading/Writing Elements in CRM Design**



- Lists of data
- Subgrids on forms
- Editable grids (where appropriate)
- Dashboard with combination of lists + graphics
- Sales Accelerator
- Tooltips on columns
- OneNote integration
- Teams integration

# Kinesthetic Learning Strategies for CRM Training & Design



# **Effective Kinesthetic Training Techniques**



#### **Learning by Doing**

Engage directly with the material, enhancing retention and understanding.

#### **Simulations**

Provide a realistic use case where learners can practice skills and apply knowledge in a controlled setting.

#### **Real-Life Scenarios / Case Studies**

Helps learners connect theoretical concepts with practical applications.

#### **Physical Activity**

Benefit from physically moving during training (especially longer training). Get up, move around. (I once had 200+ propane sales reps do yoga stretches during CRM training. True story!)

#### Lab: Create a Security Role

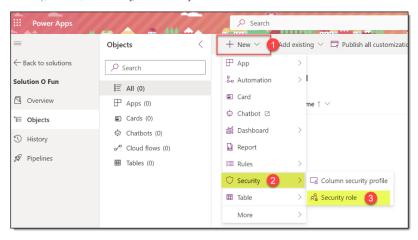
In this lab, we will create a new security role. In this example, we will assume the organization uses a layered security role approach. This Super User security role will be

We will keep this in the root business unit.

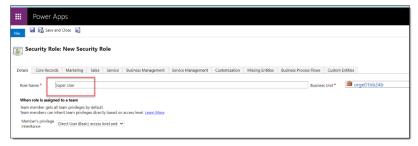
#### Getting Started: A Step-by-step

For this lab, perform the following steps:

- 1. Go to make.powerapps.com and open your solution file that you created in Chapter 1.
- 2. At the top, click + New, hover at Security, then select Security Role.



3. This opens a new tab. Give your Security role a name. In my screenshots, I will use "Super User.



#### Requirements

The Super Users need additional access. Anyone with this security role should have full organization access to the CREATE, READ and WRITE the following tables:

- Acccount
- Contact
- Lead
- Opportunity
- Opportunity
- Ouete

This user group should also have permissions to Export to Excel

Make these change to the security role you are creating, then Save and Close, which will bring you back to your solution file

#### Need help?

#### Here's some more to help you complete these requirements

# **Creating Hands-On Labs**

- Use real-world examples
- Customize for specific work roles (Sales, Service, Marketing, etc)
- Offer a business scenario, then give step-by-step instruction when needed



# **Using Simulations & Case Studies**



#### **Case Studies**

Enables learners to engage with the material and understand more complex concepts.



#### **Real-World Scenarios**

Practice real-world scenarios in your organization, similar industry and/or same department to enhance their skills and preparedness.



## **Dynamic Learning**

Role-playing activities make learning dynamic and interactive, fostering collaboration and teamwork among participants.

# Software to Help

## **Editing:**

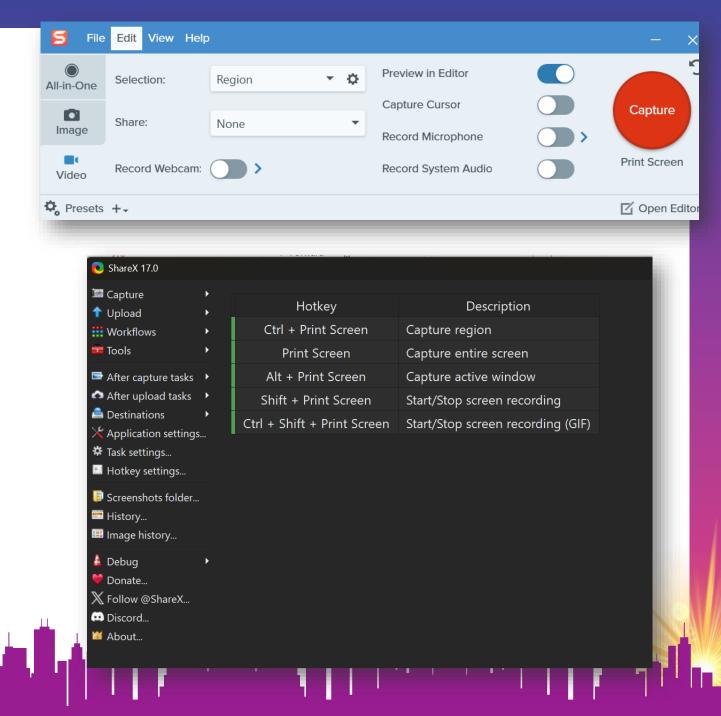
- Camtasia (paid)

## Image & video capture:

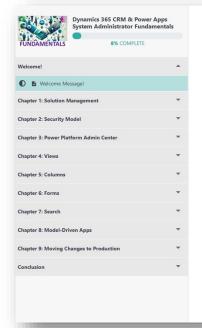
- Snagit (paid)
- ShareX (free/open source)
- Snipping Tool (free, image only)

## **Create/host on-demand video library:**

- YouTube
- SharePoint

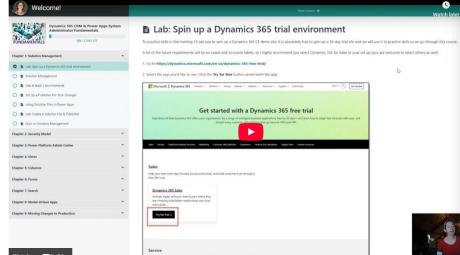


# **Examples**



#### ■ Welcome Message!

Hi and welcome to the Dynamics 365 CRM & Power Apps System Administrator Fundamentals training course. Please watch this welcome video before moving on to your firs





## CRM Heidi DYNAMICS 365, POWER PLATFORM & MORE



#### **Heidi Neuhauser**

@CRMHeidi · 1.06K subscribers · 209 videos

Welcome to my YouTube channel, where we talk all things Dynamics 365, Power Apps. Po...more

crmheidi.com and 1 more link

Customize channel

Home Videos Shorts Playlists Posts Q

#### Welcome to my YouTube channel!

815 views - 3 years ago

A long overdue short video describing what sort of content you'll find here at CRM Heidil



#### For You



76 views • 2 months ago

My 11 Year Old Builds an App: Taco Order 🐽 🐽

Power Tips: 2025 Release Wave 1 Customer Insights: Data

95 views • 11 days ago

#### Popular videos



Calendar Control in Dynami... 5.6K views • 4 years ago

Cloud Flow in Power... 4.6K views - 2 years ago

Center: Settings 4.6K views - 3 years ago : Creating a Custom Activity Type in Power Apps 4.5K views • 1 year ago

How to Implement the Toggle : How to move files from Control in a Model-Driven...

WordPress to SharePoint... 3.5K views - 3 years ago 4.4K views - 3 years ago

#### Videos



Power Tips: 2025 Release Wave 1: Dynamics 365... Updates in Dynamics 365...

Power Tips: 2025 Release Wave 1 Dynamics 365...

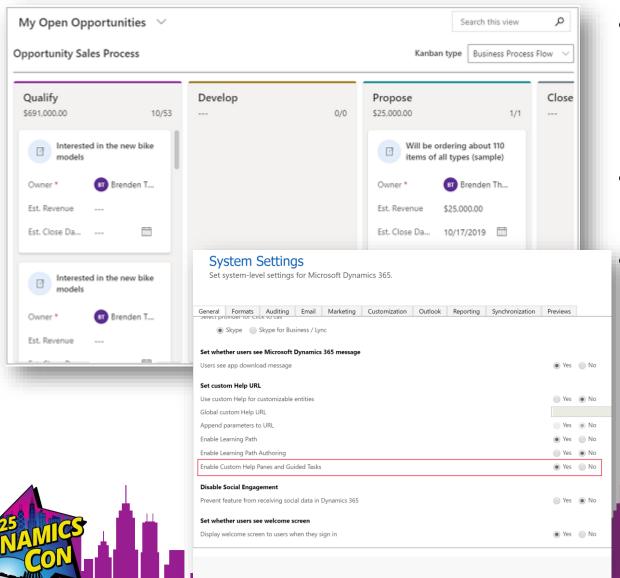
Power Tips: Dynamics 365 Power Tips: Al Prompts Sales 2025 Release Wave 1...

Dynamics 365 Sales: How to Customize the Opportunity... 225 views - 2 months ago

Power Tips Series Play all

series with MVPs Kvlie Kiser, Malcolm McAuley & Heidi Neuhauser. We dive into the Dynamic

# **Incorporating Kinesthetic Elements in CRM Design**



- Use Kanban controls (drag-and-drop interface)
  - Opportunity & Activity tables only OOB
  - Pcf.gallery for other tables
- Enable custom help with how-to videos and contextual support

Learn more about creating guided help

at this QR code:

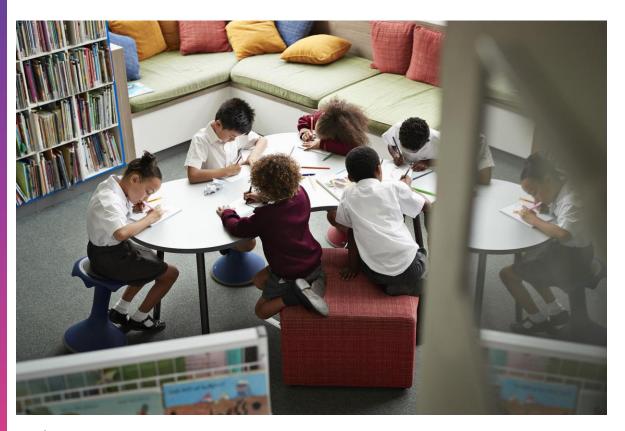




# Implementing a Blended Learning Approach & Getting Feedback



# **Combining Various VARK Strategies**



## **Multi-Modal Learning Approach**

Using various VARK strategies accommodates different learning styles, creating a more inclusive educational environment.

## **Addressing Diverse Needs**

Diverse learner needs and preferences can be effectively met through the implementation of varied VARK strategies.

### **Enhancing Learner Engagement**

Combining VARK strategies enhances learner engagement by catering to visual, auditory, reading, and kinesthetic learners.



# **Tracking Learner Progress and Feedback**



## **Importance of Tracking**

Regular tracking of learner progress is crucial for identifying areas of improvement in training programs.



#### **Feedback Collection**

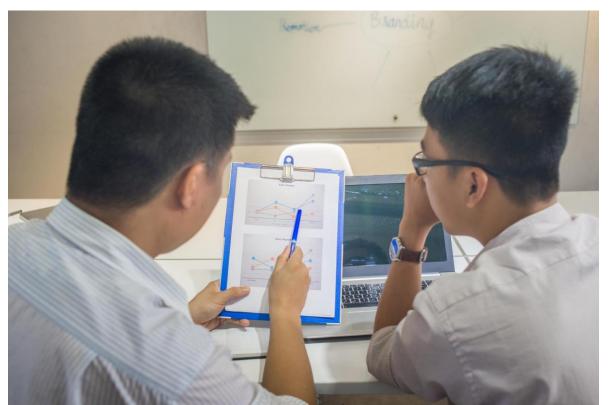
Gathering feedback helps in fine-tuning the training strategies to meet learner needs effectively.



## **Continuous Improvement**

Data from tracking and feedback allows for ongoing adjustments, ensuring the training remains relevant and effective.

## **Adjusting Training Programs Based on Outcomes**



## **Importance of Adaptation**

Adjusting training programs based on outcomes is crucial for maintaining their effectiveness and relevance in a changing environment.

## **Enhancing Learner Experience**

Responsiveness to learner needs leads to an enhanced training experience, making learning more impactful and engaging.



## **How to Train Your Users: A Few Ideas**



#### Visual

- Live training
- Charts
- Graphs
- Diagrams
- Flow charts
- Webinar
- Vary layouts, colors & fonts in presentations
- Storyboard that maps user journey

## Aural/Auditory

- Live training
- Lecture
- Discussion groups
- Teams discussions
- SharePoint libraries
- Webinar
- Podcasts
- Narrated walkthroughs
- Discussion prompts

## Reading & Writing

- Live training
- PowerPoint
- Quick Reference Guides
- Job Aids
- Handouts
- Lists
- Tables
- Interactive documentation:
   OneNote, Teams

#### Kinesthetic

- Live training
- Demos
- One-on-one / small group
- Coaching
- Videos
- Hands-on labs
- Case studies
- Guided exercises
- Simulation exercises



# A Bit More on Online Modules...



# Here's my Online Course..

- 9 Modules
- Most have at least one hands-on lab
- Many have videos
- Many have bulled how-to lists
- Most have a quiz at the end



#### ▼ Welcome!

■ Welcome Message!
Add Lesson... or Add Quiz...

#### **▼** Chapter 1: Solution Management

- Lab: Spin up a Dynamics 365 trial environment
- Solution Management
- Use at least 2 environments
- Set Up a Publisher For Your Changes
- Using Solution Files in Power Apps
- Lab: Create a Solution File & Publisher
- Quiz on Solution Management Add Lesson... or Add Quiz...

#### ▼ Chapter 2: Security Model

- Security Model Fundamentals
- Lab: Create Business Units
- Lab: Create a Security Role
- Quiz on Security Model Add Lesson... or Add Quiz...

#### ▼ Chapter 3: Power Platform Admin Center

- Power Platform Admin Center Walkthrough
- Lab: Update Settings in the Power Platform Admin Center
  Add Lesson... or Add Quiz...

#### ▼ Chapter 4: Views

- Working with Views
- Updating an Existing System or Public View
- Add New System or Public View
- Lab: Working with Lead table Views
- ✓ Quiz on Views
  Add Lesson... or Add Quiz...
- ► Chapter 5: Columns



# Let's look at one of these modules...

Focused on multi-modal delivery of information

Self-paced

Varied delivery types

Feedback check



Dynamics 365 CRM & Power Apps System Administrator Fundamentals

8% COMPLETE

Chapter 1: Solution Management	_
Lab: Spin up a Dynamics 365 trial environment	
O B Solution Management	
Use at least 2 environments	
Set Up a Publisher For Your Changes	
Using Solution Files in Power Apps	
○ 🖺 Lab: Create a Solution File & Publisher	
Quiz on Solution Management	
Chapter 2: Security Model	~
Chapter 3: Power Platform Admin Center	*
Chapter 4: Views	*
Chapter 5: Columns	~
Chapter 6: Forms	•
Chapter 7: Search	*
Chapter 8: Model-Driven Apps	*
Chapter 9: Moving Changes to Production	~
Conclusion	-

## Quiz on Solution Management

What is the minimum number of Dynamics 365 environments I should use if I follow good solution management best practices? *
O 1
O 2
O 3
O 4
True or False: I should make my configuration changes directly in the default solution. *
○ True ○ False
True or False: As a system administrator who wants to follow solution management best practices, it is important to make sure my user group tests changes in Sandbox before moving them to production. *
○ True ○ False
When building my solution file on make.powerapps.com, which of the following should I add to a Table? *
Only the necessary components
O All components
O No components
Submit

# Conclusion



Inclusive Learning Environment



**Engagement Strategies** 



Improved Training
Outcomes





# VARK Resources

https://vark-learn.com/

Take the questionnaire: <a href="https://vark-learn.com/the-vark-questionnaire/">https://vark-learn.com/the-vark-questionnaire/</a>



# Thank you! © Stay in touch & follow me for more tips!

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