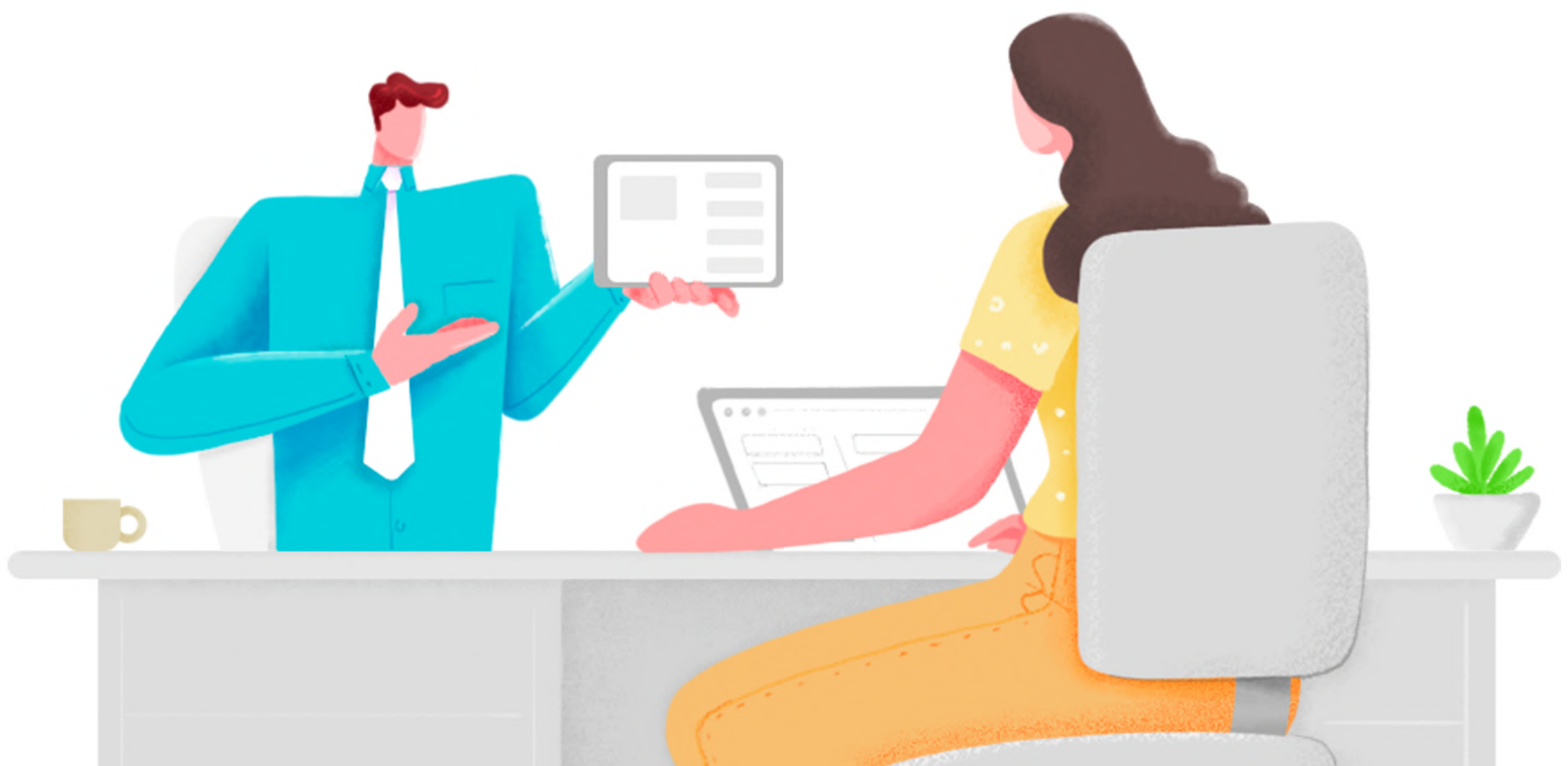




Zoho CRM for Sales representatives

Virtual training - Agenda



Agenda

2 Days 5 Hours

Day 1

Module 1



Introduction

- Welcome to Zoho CRM
- Course objectives
- Learning path

Module 2



Setting up your account

- Accessing Zoho CRM
- Customizing personal information

Module 3



Lead nurturing and sales process automation

- Lead management
- Account and contact management
- Prospecting deals

Module 4



Inventory management

- Products
- Quotes and invoices
- Sales orders and purchase orders
- Vendor management

Module 5



Follow-up and collaboration

- Tasks
- Meetings
- Calls

Module 6



Mass actions

- Mass email
- Macros
- Tags
- Emails
- Mass convert
- Transferring ownership
- Deleting records
- Updating fields

Module 7



Sales collaboration

- Sharing records with colleagues.
- Collaborating with colleagues using feeds.

Day 2

Module 8



Sales metrics

- Default reports
- Managing reports and dashboards

Module 9



Customization

- Different types of views
- Advanced filters
- Templates (Email and mail merge templates)
- Home page customization

Module 10



Engaging with customers

- Email integration (using IMAP or POP)
- Bcc dropbox
- Social communication with prospects
- Email intelligence
- Signals

Module 11



Automation

- Workflow rules
- Actions that help in automation
- Lead scoring

Module 12



Process management

- Getting approval from managers

Module 13



Data administration

- Import (module-specific import)
- Import history
- Export
- Recycle bin
- Audit logs

Module 14



Extensions and integrations

- Zoho apps
- Google (Calendar, Contacts, and Chrome extension)
- Microsoft

Module 15



Mobile app for Zoho CRM



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