

Zoho CRM for Sales Representatives Course Plan



About:

This course is designed to provide instruction and hands-on experience in lead nurturing, managing a sales pipeline, and closing deals faster. Learn how to use Zoho CRM tools to effectively engage with prospects and increase productivity.

Who it is for:

Sales representatives interested in practical training in using Zoho CRM to manage their day-to-day sales activities and improve their performance.

Day One

Module 1: **Introduction**

- Welcome to Zoho CRM
- Introduction to sales force automation
- Course objectives
- Learning path

Module 2: **Setting up your account**

- Accessing Zoho CRM
- Personalizing CRM interface
- Navigation and important operations

Module 3: **Lead Nurturing**

- Importance of lead nurturing in sales
- Following up leads

Module 4: **Sales Management**

- Account and contact management
- Prospecting deals

- Building sales pipeline
- Price quotes and closing deals

Module 5: **Field Sales Operations**

- Importance field sales
- Mobile App for Zoho CRM
- Leads App
- Best practices

Day Two

Module 6: **Engaging with Customers**

- Overview of multichannel communication in Zoho CRM
- Using email integration with CRM
- Using personalized email templates
- Managing phone calls from within CRM
- Chatting with prospects
- Interacting with prospects through social media
- Walk through
- Q & A

Module 7: **Sales Collaboration**

- Sharing records with colleagues
- Using sales collaterals
- Collaborating with colleagues using feeds
- Using personalized email templates
- Walk through
- Q & A

Module 8: **Maximizing Sales Productivity**

- Importance of sales productivity
- Advanced filters
- Macros
- Workflow operations
- Sales process flow
- Getting approval from managers

Module 9: **Sales Metrics**

- Using reports
- Managing reports and dashboards

Module 10: **Using Extensions**

- Overview of extensions
- Plug-in for MS Outlook
- Plug-in for MS Office
- Google Apps/Office 365 Integration

Summary

- A Day in the life of sales rep
- Best practices in sales management
- Sharing training experience
- What's next?



For more information

Email: training@zohocrm.com