



Begin

by **ZOHO** CRM

Training Agenda

begin.com

About:

This is an one-day training program for Bigin. The training duration is for seven hours (including breaks).

Who is it for?

Bigin is a pipeline-centric CRM solution focused exclusively on small and micro businesses who are still stuck using spreadsheets and have never tried a CRM solution for their business before. It's also an ideal fit for freelancers and individuals who want to manage their business pipelines online.

With features like multiple pipelines, built-in telephony, and workflow automation, Bigin contains just the right feature set to help small businesses run a full-scale customer-facing process inside their CRM.

Agenda

Getting started

- Introduction to Bigin
- Basic app terminologies

Data organization and process management

- Team Pipelines
- Contacts
- Companies
- Products
- Activities



Users and control

- Roles and profiles
- Add users

Import

- Import from a file
- Import from other CRMs

Email integration

- Email configuration
- Org emails
- Email insights and Signals
- Email-In topping

Advanced features

- Webforms
- Email templates
- Mass emails
- Workflow rules
- Stage transition rules

Other channels

- Telephony
- Twitter



Data analysis

- Managing dashboards
- Adding KPIs and charts

Data administration

- Export
- Data backup
- Recycle bin
- Audit log
- Storage

Toppings and Marketplace

- Zoho applications
- Third-party apps
- Toppings

Mobile apps

Subscription management

- Pricing plans explained (if prospects are present)
- Upgrading to a paid plan (if prospects are present)
- Increase feature limits through add-ons (for existing customers)

