

Zoho CRM for Sales Representatives

Course Description

This comprehensive training program is designed for sales representatives who wish to enhance their proficiency in using Zoho CRM. Participants will gain practical knowledge and skills to manage their daily sales activities effectively, automate their sales processes, and improve their overall performance. The course covers essential features, advanced functionalities, and customization options within Zoho CRM, ensuring participants can leverage the platform to its full potential.

Audience

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

Pre-requisite Knowledge/Skills

Basic understanding of sales processes and a willingness to learn how to use Zoho CRM for improved sales management.

Course Objectives

By the end of this course, participants will be able to:

- Log in and navigate Zoho CRM efficiently
- Automate sales processes and manage sales pipelines
- Handle inventory management tasks
- Conduct follow-up and collaboration activities
- Perform mass actions for improved efficiency
- Analyze sales metrics and manage reports
- Customize Zoho CRM to fit their personal and business needs
- Engage effectively with customers using various communication tools
- Administer data and maintain CRM data integrity
- Utilize extensions and integrations for enhanced functionality
- Leverage Zia's AI capabilities for smarter sales management

Course Outline

Module 1: Getting Started with Zoho CRM

- Logging in to your account
- Accessing Zoho CRM
- Customizing your personal information

Module 2: Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns

Module 3: Inventory Management

- Products
- Quotes and Invoices
- Sales Orders and Purchase Orders

Module 4: Follow-up and Collaboration

- Tasks
- Meetings
- Calls
- Calendar Booking

Module 5: Mass Actions

- Mass Emails
- Macros
- Manage Tags
- Mass Conversion
- Transferring Ownership
- Updating Fields
- Sales Collaboration
- Collaborating with colleagues using feeds

Module 6: Sales Metrics

- Default Reports
- Managing Reports and Dashboards

Module 7: Customization

- Different types of views
- Advanced Filters
- Templates (Email and Mail Merge templates)
- Home page Customization (user-specific)

Module 8: Engaging with Customers

- Email Integration (using IMAP or POP)
- BCC Dropbox
- Signals
- Working with Lead Scoring

Module 9: Data Administration

- Import (module-specific)
- Import History
- Recycle Bin
- Audit Logs

Module 10: Extensions and Integrations

- Google (Calendar, Contacts, and Chrome Extension)
- Microsoft
- Zoho CRM Mobile Apps

Module 11: Zia in CRM

- Suggestions by Zia - best time to contact
- Data Enrichment by Zia
- Ask Zia