

Zoho CRM for Sales Manager

Course Duration: 3 days (24 hours)

Course Description:

The **Zoho CRM for Sales Managers** training program offers a comprehensive, in-depth learning experience designed to empower Sales Managers to effectively manage sales operations and drive performance using Zoho CRM. This course spans multiple learning paths and covers the latest features and enhancements of the platform, ensuring participants stay current with Zoho CRM's evolving capabilities.

Through hands-on sessions and practical exercises, participants will develop real-world skills in managing leads and deals, setting up sales processes, analysing performance metrics, and enhancing team collaboration.

By the end of this training, you will be well-equipped to leverage Zoho CRM to optimize sales strategies, improve customer relationships, and contribute to overall business growth.

Audience Profile:

This course is ideal for:

- Sales managers and team leads who oversee, guide, and support salespeople within their department or across the organization.
 - Zoho customers seeking to enhance their understanding of Zoho CRM's sales management capabilities.
 - Business owners looking to optimize their sales processes and drive revenue growth using Zoho CRM.
 - Professionals responsible for analysing sales performance, setting targets, and managing pipelines within their teams.
 - Anyone aiming to leverage Zoho CRM to improve sales efficiency, team collaboration, and customer engagement.
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Prerequisites:

Participants should have:

- A basic understanding of CRM/Sales concepts. No prior experience with Zoho is required.
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Course Objectives:

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

- Configure Zoho CRM to align with their sales processes, including setting up territories, sales stages, and performance metrics.
- Manage and monitor sales pipelines effectively using tools like deal stages, forecasts, and dashboards.
- Guide and support sales teams by assigning roles, defining targets, and setting up automation for lead distribution and follow-ups.
- Analyse sales performance and customer behaviour using reports, analytics, and AI-powered insights from Zia.
- Collaborate seamlessly with colleagues inside Zoho CRM, maximizing sales productivity through features like advanced filters, macros, workflows, and approval processes.
- Manage contacts and accounts, build a sales pipeline, and prospect deals within Zoho CRM.
- Utilize the Zoho CRM mobile app to execute field sales operations efficiently and generate field sales metrics to assess the sales team's progress.

Table of Contents (TOC):

Module 1: Setting up 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, Invoices
- Sales Orders and Purchase Orders
- Price Books, and Vendors

Module 4: Follow-up and Collaboration

- Tasks, Meetings, Calls, Calendar Booking
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Module 5: Mass Actions

- Macros
 - Working with Tags
 - Mass Emails
 - Mass Conversion
 - Transferring Ownership
 - Deleting Records
 - Updating Fields
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Module 6: Customization

- Different types of views
 - Advanced Filters
 - Templates (Email and Mail Merge templates)
 - Home page customization (user-specific)
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Module 7: Channels

- Email Integration (using IMAP or POP)
 - BCC Dropbox
 - Social communication with prospects
 - Signals
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Module 8: Collaborations and Reports

- Reports and Dashboards
 - Forecasts
 - Feeds
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Module 9: Sales Performance Management

- Motivator
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Module 10: Automation

- Workflow operations
 - Actions that help in automation
 - Lead Scoring
 - Assignment Rules
 - Case Escalation Rules
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Module 11: Integrations

- Google (Calendar, Contacts, and Chrome Extension)
 - Microsoft
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Module 12: Overview of Process Management

- Blueprint
 - Approval Processes
 - Review Processes
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Module 13: Data Administration

- Import (module-specific)
 - Import History
 - Export
 - Recycle Bin
 - Working with Sandbox
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Module 14: Zia in Zoho CRM

- Suggestion by Zia - best time to contact
 - Data Enrichment by Zia
 - Capabilities of Zia in Zoho CRM
 - Ask Zia
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Module 15: Mobile apps

- CRM Mobile App
- CRM Analytic App

Labs - Hands-on exercises will be provided to ensure participants gain practical, real-world experience with Zoho CRM. These sessions are intended to offer a broad overview with industrial examples—they're not tailored to specific business requirements.