

## 8521 - Microsoft® CRM 3.0 Sales Management

### IN BRIEF

**Delivery:** Instructor-led course

**Duration:** One day

**Class size:** 10 Students Max.

**Cost:** \$850 per person + GST

**Inclusions:** Microsoft expert instructor, comprehensive course manual, individual computer access, and fully catered lunch, morning and afternoon tea breaks.

**Prerequisites:** General knowledge of Microsoft Windows and an understanding of Customer Relationship Management solution processes and practices.

**Products Covered:** Microsoft CRM 3.0

**Previous Training:** None

### Course Description

This instructor-led course explores the Microsoft CRM application from a user's perspective. Functionality covered in the course includes core CRM navigation, user interface, outlook client and the sales management module. It uses a hands-on approach to teach the processes and functionality used by sales managers and sales representatives, beginning with an introduction to the core concepts of Microsoft CRM and then giving an overview of the sales processes.

### Audience

This course is recommended for individuals who need to implement, use, maintain, consult or support Microsoft CRM within their organisation. The session is targeted toward sales representatives who need to understand the technical aspects of Microsoft CRM and gain foundation knowledge to the application functionality.

### Topics Covered

#### Microsoft CRM Concepts

- Microsoft CRM Modules
- Accessing Microsoft CRM
- Customer records
- Customer relationships
- Understanding customisation availability

#### Microsoft CRM Client for Outlook

- Functionality available
- Navigation within the user interface
- Creating CRM records and activities in Outlook
- Managing CRM records and activities in Outlook

#### Sales Management Life Cycle

- Creating leads using the Lead Form
- Qualifying and converting leads into opportunities
- Creating quotes, orders and invoices from opportunities
- Relationships between accounts, sub-accounts and contacts

#### Lead Management

- Creating and importing leads
- Assigning, sharing and converting leads
- Disqualifying and reactivating leads
- Reporting with leads

#### Completing the Sale

- Managing and working with opportunities
- Using workflow and sales processes
- Quotes, orders and invoices

#### Sales Productivity

- Evaluating customer data using Advanced Find query function
- Managing and analysing sales productivity
- Marketing collaboration

#### Sales Administration

- Automated sales and workflow processes
- Managing competitors
- Creating a product catalogue and managing sales literature