Microsoft Dynamics CRM 4.0 - Sales, Marketing and Service

IN BRIEF

Delivery: Instructor-led course

Duration: Three days

Class size: 10 Students Max.

Cost: $2,300 per person + GST

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

Prerequisites: Before attending this course, students must have a general knowledge of Microsoft Windows and an understanding of Customer Relationship Management solution processes and practices

Products Covered: Microsoft CRM 4.0

Previous Training: None

Course Description

This three-day course teaches students use the Microsoft Dynamics CRM product. Application functionality covered in the course includes:

- Sales Management
- Marketing Automation
- Service Management
- Service Scheduling

Audience

Microsoft Dynamics CRM training is recommended for individuals or anyone that plans to implement, use, maintain, consult, or support Microsoft CRM in their organization. The class is targeted toward sales representatives, administrators, office managers, CEO's, and consultants who need to understand the technical aspects of Microsoft CRM and gain foundational knowledge of the application functionality.

Topics Covered

Introduction to Microsoft Dynamics CRM
Gaining a Competitive Advantage through CRM
Understanding Customer Relationships
Balancing Usability and Reporting

Understanding Microsoft Dynamics CRM Software
Understanding the Server and Client
Accessing Microsoft Dynamics CRM
Understanding the User Interface
Personalizing the CRM Experience

Using Microsoft Dynamics CRM in a Global Market
Understanding Multi-Language Support
Understanding Multi-Currency
Setting Personal Options

The Customer-Centred View
Viewing the Customer
Implementing Processes to Support Microsoft Dynamics CRM
Understanding Customer Records
Relationships Between Records
Understanding Record Ownership and Assignment
Using Activities to Track Customer Interactions
Using Workflows
Finding and Maintaining Data
Using Duplicate Detection
Understanding the Subject Tree

Understanding Microsoft Dynamics CRM for Outlook
Understanding Integration Between Microsoft Dynamics CRM and Outlook
Understanding Records
E-mail Management
Creating Mail Merge Documents
Understanding Differences Between Outlook Clients
Synchronizing CRM Data

Sales

An Introduction to Sales
Introducing Sales Management
Managing Leads
Managing Opportunities
Processing Sales Orders6
Managing Products and Pricing
Keeping Track of Competitors
Managing Sales Literature

Opportunity Management
Understanding Opportunities
Sales Processes and the Sales Pipeline Report
Creating Opportunities
Working with Opportunities
Closing Opportunities

Managing Leads
Using Leads
Creating and Importing Leads
Tracking and Converting Leads
Disqualifying and Reactivating Leads
Reporting on Leads

Understanding the Product Catalogue
Unit Groups
Adding Products
Creating Price Lists
Creating Discount Lists

Sales Order Processing
Understanding Sales Order Processing
Creating and Revising Quotes
Creating and Tracking Orders
Creating and Closing Invoices

Topics Covered Continued Overleaf.........

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.......Topics Covered Continued

Sales Reporting
Evaluating Sales Data
Measuring Performance with Sales Productivity Reports
Using Export to Excel
Using the Report Wizard

Marketing

Understanding Marketing Campaigns
Benefits of Closed Loop Marketing
Marketing Versus Quick Campaigns
Using Quick Campaigns
Understanding Marketing Campaigns
Managing Campaign Responses
Analyzing Campaigns

Planning and Creating Marketing Campaigns
Creating Quick Campaigns
Creating a Marketing Campaign
Creating and Using Marketing Lists
Creating and Using Templates

Managing Marketing Campaigns
Distribute Campaign Activities
Monitoring Marketing Campaigns
Capturing and Viewing Campaign Responses
Working With Campaign Responses
Analyzing Marketing Information

Service Management

Understanding Service Management
Understanding Subject Trees
Understanding the Service Management Process Flow

Managing Contracts
Understanding Contracts
Creating and Managing Templates
Creating and Modifying a Contract and Contract Lines
Renewing Contracts
Working with Contracts

Managing Cases
Understanding Case Management
Viewing and Creating Cases
Assigning and Reassigning Cases
Accepting cases Viewing, Editing, and Working on Cases
Resolving Cases
Sharing Cases
Reactivating Cases
Cancelling and Deleting Cases
Using Case Management Reports

Creating a Knowledge Base
Working with Article Templates
Creating and Submitting Articles
Approving, Publishing, and Rejecting an Article
Finding Information

Managing Service Queues
Overview of Queues
Setting Up Public Queues
Deleting Queues
Working with Queues

Service Scheduling

Service Scheduling Life Cycle
Service Scheduling Introduction and Terminology
Service Scheduling Scenarios
Service Scheduling Process Flow

Scheduling Services For Your Customers
Scheduling Services
Navigating and Booking Service Activities in the Service Calendar
Booking Service Activities
Scheduling Service Activities
Close, Cancel, or Reschedule a Service Activity
View Service Activities and Appointments
Setting Service Activity Preferences

Maintaining Users and Resources
Scheduling Users and Other Resources for Services
User Work Schedules
Creating a Group of Resources that can be Scheduled Together
View Schedules for Resources
Manage How Resources are Allocated for Service Activities
Create, Edit, or Add Members to a Site
Set or Edit Business Closures

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