Sales Management in Microsoft Dynamics CRM 2011

Cursusduur: 1 Dagen   Cursuscode: M80291

Beschrijving:

This course introduces the capabilities of Sales Management in Microsoft Dynamics CRM that allow you to track and manage the sales process from potential to close. It provides insight on using the Product Catalog and process sales information. It also introduces some of the tools used to analyze and report on sales information.

Doelgroep:

This course is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available sales features in the Microsoft Dynamics CRM product.

Doelstelling:

- Gain a conceptual understanding of the Microsoft Dynamics CRM sales process

- Understand the role of the core record types used in Sales Management

- Discuss when to use leads to qualify or disqualify opportunities

- Use process dialogs to automate lead and opportunity management

- Use the Product Catalog

- Create Price Lists for campaigns and special offers

- Create orders, quotes and track order fulfillment

- Use Lists, Views and Charts to obtain important sales information

- Work with and create dashboards

Vereiste kennis en vaardigheden:

- General working knowledge of customer relationship management
- General understanding of business processes
- General working knowledge of Microsoft Windows.

Cursusinhoud:

Module 1: Introduction

This module introduces the capabilities of Microsoft Dynamics CRM that allow you to track and manage the sales process from potential to close.

- Overview of the Sales Process in Microsoft Dynamics CRM
- Core Records in the Sales Process
- Tracking Competitors and Managing Sales Literature
- Working with Leads
- Working with Opportunities
- Sales Processes, Workflows and Dialogs

Lab : Qualify and Convert Leads

Lab : Running a Dialog Process

After completing this module, students will be able to:

- Gain a conceptual understanding of the Microsoft Dynamics CRM sales process.
- Understand the role of the core record types used in Microsoft Dynamics CRM Sales Management.
- Identify when and how to use the Competitors and Sales Literature record types.
- Identify when to use leads to qualify or disqualify opportunities.
- Create, work with and close opportunities.
- Reopen opportunities.
- Use process dialogs to automate lead and opportunity management.
- Identify the features and benefits of the product catalog.
- Create and maintain unit groups for the product catalog.
- Add products to the product catalog, and describe the use of kit products and substitute products.
- Create price lists and configure for different customers, marketing campaigns and special offers.
- Set up different price lists for different types of customers and marketing campaigns.
- Identify what constitutes a complete sales transaction.
- Understand how opportunities and quotes are related to each other, and how they can be used together in the sales process.
- Create a new order, create an order from a quote, and track order fulfillment.
- Create an invoice from an order and close or cancel an invoice.
- Use Lists, Views, and Charts to obtain important sales information.
- Use sales reports to review potential

Lab : Create a Special Offer Price List

Lab : Use a Special Offer Price List for an Opportunity

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- Create a new order, create an order from a quote, and track order fulfillment.
- Create an invoice from an order and close or cancel an invoice.
- Use Lists, Views, and Charts to obtain important sales information.
- Use sales reports to review potential opportunities, forecast revenue, and analyze sales productivity.
- Create custom reports with the Report Wizard.
- Export the results of an Advanced Find or view a Microsoft Excel spreadsheet using the Export to Excel feature.
- Create and manage sales goals for individuals, teams, and your organization.
- Create and share personal charts and system charts.
- Work with and create dashboards.

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Module 4: Analysis, Reporting and Goals

This course discusses a number of tools you can use to analyze and report on sales-related information in Microsoft Dynamics CRM.

- Analyzing Sales Information with Lists,

opportunities, forecast revenue, and analyze sales productivity.
- Create custom reports with the Report Wizard.
- Export the results of an Advanced Find or view a Microsoft Excel spreadsheet using the Export to Excel feature.
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Module 2: Working with the Product Catalog

This module describes the role of the product catalog in Microsoft Dynamics CRM and the benefits of using it. It shows the tasks that are required to configure a product catalog, including setting up and maintaining unit groups, products, and price lists. It also describes and demonstrates the important role of the product catalog and price lists in the sales process.

- The Product Catalog and the Sales Process
- Unit Groups
- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists

Module 3: Sales Order Processing

This module discusses the tools used to capture important sales information and uncover new business opportunities. Although, quotes, orders, and invoices are an important part of the sales processes and provide a complete view of the customer, implementing a sales process allows users to initiate, track, and close sales consistently and efficiently.

- The Microsoft Dynamics CRM Sales Order Process
- Opportunities, Quotes, and the Sales Process
- Working with Orders
- Working with Invoices

Lab : Create Multiple Quotes from an Opportunity

Lab : Convert a Quote to an Order

Views and Charts
- Working with Reports
- Exporting Sales Information to Microsoft Office Excel
- Creating and Managing Sales Goals
- Creating Charts
- Dashboards

Lab : Create a Sales Goal for Opportunities

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Nadere informatie:

Neem voor nadere informatie of boekingen contact op met onze Customer Service Desk 030 - 60 89 444

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