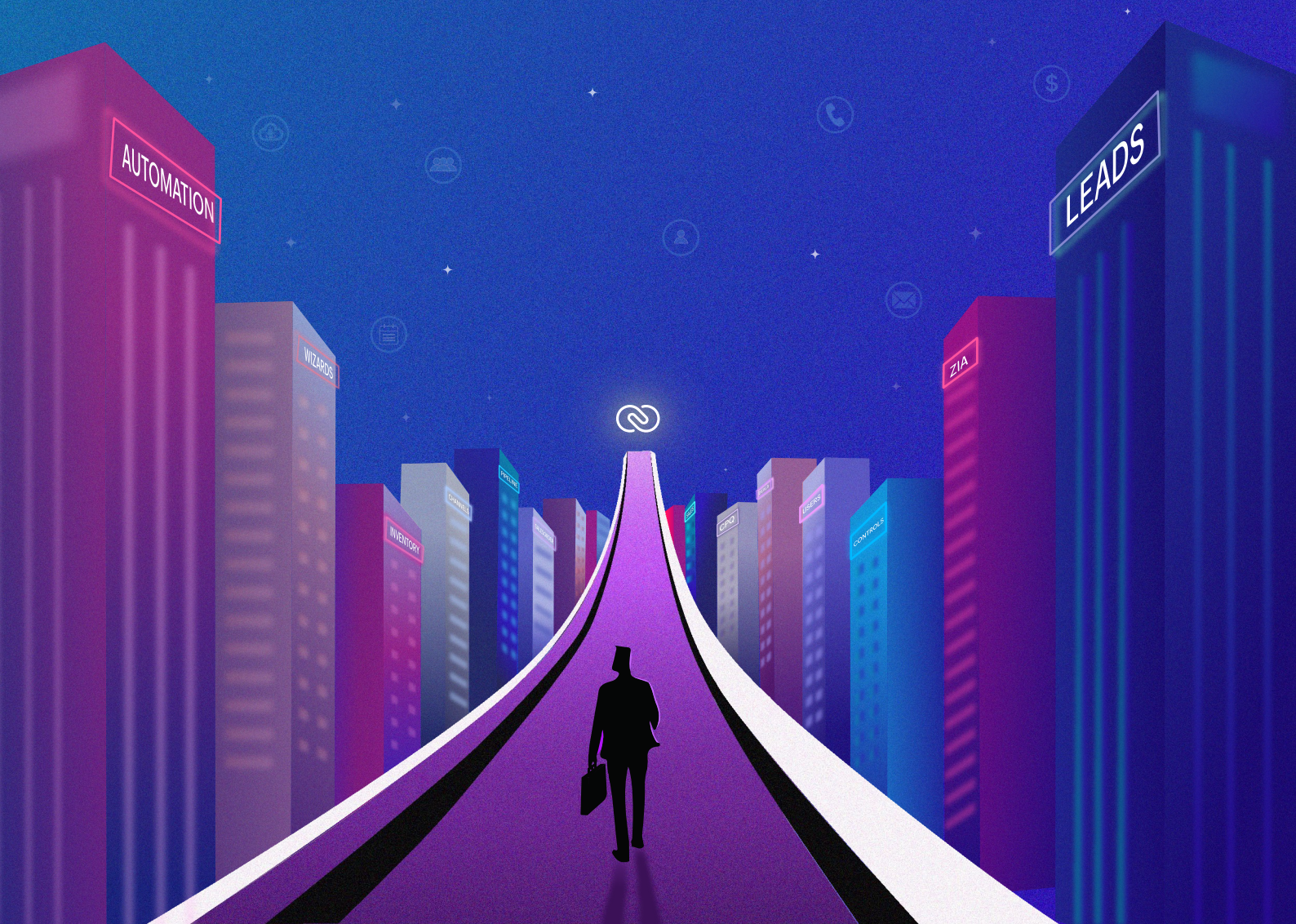
ZOHO

Zoho CRM

SALES MANAGER AGENDA

For sales managers and business developement managers



Summary

Duration: 3 days | 6 hours per day (Inclusive of breaks)

About the training:

The Zoho CRM for Sales Manager training program offers an in-depth, virtual classroom experience to help Sales Managers efficiently set up and manage their businesses using Zoho CRM. This training covers the latest features and enhancements of Zoho CRM and includes hands-on sessions with the product.

Who it is for?

Sales managers and team leads who oversee, guide, and/or support salespeople within their department or across the organization.

Training Delivery and Format:

The training sessions will be delivered exclusively in English, using general examples and use cases from industries such as fitness, automotive, and education. These sessions are intended to offer a broad overview with industrial examples—they're not tailored to specific business requirements. Trainers will not be able to assist in customizing your CRM for individual business needs. Each session will run for six hours daily over three days.



Setting up your account

- Accessing Zoho CRM
- Customizing your personal information

Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns

Inventory Management

- Products
- Quotes and Invoices
- Sales Orders and Purchase Orders
- Price Books and Vendors

Follow-up and Collaboration

- Tasks
- Meetings
- Calls
- Calendar Booking

Mass Actions

- Macros
- Working with Tags
- Mass Emails
- Mass Conversion
- Transferring Ownership
- Deleting Records
- Updating Fields



Customization

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

Channels

- Email Integration (using IMAP or POP)
- BCC Dropbox
- Social communication with prospects
- Signals

Collaborations and Reports

- Reports and Dashboards
- Forecasts
- Feeds

Sales Performance Management

- Motivator



Automation

- Workflow Operations
- Actions that help in automation

- Lead Scoring
- Assignment Rules
- Case Escalation Rules

Integrations

- Google (Calendar, Contacts, and Chrome Extension)
- Microsoft

Overview of Process Management

- Blueprint
- Review Processes
- Approval Processes

Data Administration

- Import (module-specific)
- Import History
- Export
- Recycle Bin
- Working with Sandbox

Zia in CRM

- Suggestion by Zia - best time to contact
- Data Enrichment by Zia
- System Recommendations
- Ask Zia

Mobile App

- Zoho CRM Mobile
- Zoho CRM Analytics