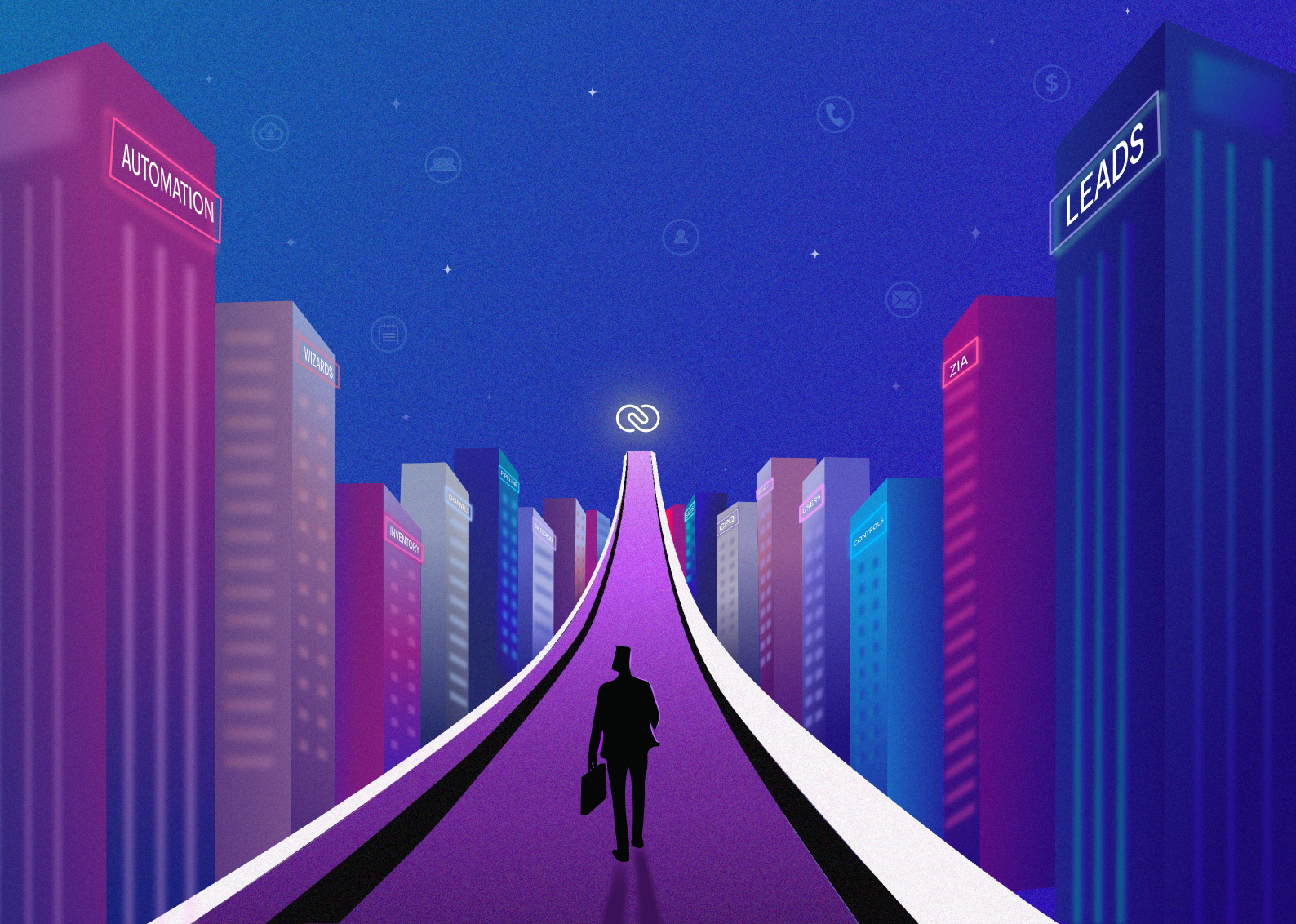
ZOHO

Zoho CRM

SALES REP AGENDA

For sales reps and sales team members.



Summary

Duration: 2 days | 5 hours per day (Inclusive of breaks)

About the training:

The Zoho CRM for Sales Representative training program offers an in-depth, virtual classroom experience to help Sales Representative 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 representatives interested in practical training in using Zoho CRM to manage their day-to-day sales activities and improve their performance.

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 five hours daily over two days.



Logging in to 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

Follow-up and Collaboration

- Tasks
- Meetings
- Calls
- Calendar Booking

Mass Actions

- Mass Emails
- Macros
- Manage Tags
- Mass Conversion
- Transferring Ownership
- Updating Fields

Sales Collaboration

- Collaborating with colleagues using feeds



Sales Metrics

- Default Reports
- Managing Reports and Dashboards

Customization

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

Engaging with Customers

- Email Integration (using IMAP or POP)
- BCC Dropbox
- Signals
- Working with Lead Scoring

Data Administration

- Import (module-specific)
- Import History
- Recycle Bin
- Audit Logs

Extensions and Integrations

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

Zia in CRM

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

Mobile Apps

- CRM Mobile App
- CRM Analytic App