



SETTING UP YOUR NEW SUGARCRM WORKSPACE

Duration:

1 DAY

Level:

INTRODUCTORY

Code:

CRM101

Objectives:

The objectives of this one-day program are:

- to become familiar with the SugarCRM user interface and basic navigation
- to be able to determine where to find information based on the sales cycle
- to understand how and where to input and update information in SugarCRM
- to be able to use SugarCRM for total client relationship management

Target Audience:

Sales Directors
Sales Managers
Sales Executives

Marketing Directors
Marketing Managers
Business Leaders

Course Outline:

Session 1:

Setting Up Your Personal Workspace

- Log-in, house-keeping and the Dashboard
- Simple navigation, the top menu bar
- Sorting and selecting
- Email settings, signature and templates

Session 2:

SugarCRM Sales Terminology

- The difference between 'targets' and 'leads'
- 'Accounts' and 'contacts'
- 'Campaigns', 'opportunities' and 'pipeline'
- Migrating 'targets' to 'leads' to 'contacts'

Session 3:

How And Where To Input Data

- Editing existing records
- Entering new records
- Creating email templates
- Managing your calendar

Session 4:

How To Manage Your Relationships

- Setting up reminders
- Noting every client/lead touch down
- Planning your calendar
- Interpreting your sales pipeline

Course Abstract:

The term 'Sales Automation' has a horrible ring to it. Customers do not want to be sold to, especially by a machine, no, they want to buy from someone (they trust)! And sales professionals know better than to let customers think the sale is anything but a deeply personal process with a win-win outcome.

This puts the onus on the sales professional to keep organised in order to stay focused on the customer. SugarCRM is designed to help do just that.

This course is mandatory for anyone ambitious enough to reach out to more customers and skilled enough to generate more sales from existing customers.

If you have no time to figure out how to use SugarCRM by yourself, you need this easy, introductory drivers guide to get the most out of this outstanding tool.

Note: