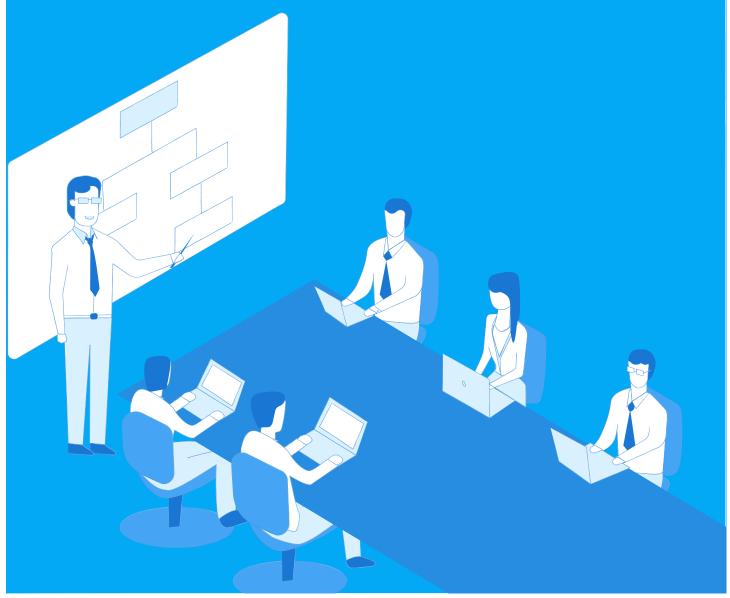# Zoho CRM for Sales Managers Course Plan

**ZOHO** CRM

**About:**

This course is designed to provide insight into strategizing and managing the sales cycle. Learn how to forecast demand, coordinate between teams and territories, and create and run reports.

**Who it is for:**

Sales Managers and Team Leads who oversee, guide, and/or support salespeople within their department or across the organization.

# Day One

## Module 1:  Introduction

- Welcome to Zoho CRM
- Introduction to sales force automation
- Course objectives
- Learning path

## Module 2: Setting up your account

- Accessing Zoho CRM
- Personalizing CRM interface
- Navigation and important operations

## Module 3: Lead Nurturing

- Importance of lead nurturing in sales
- Following up leads

## Module 4: Sales Management

- Account and contact management
- Prospecting deals
- Building sales pipeline
- Price quotes and closing deals

## Module 5: Field Sales Operations

- Importance field sales
- Mobile App for Zoho CRM
- Leads App
- Best practices

# Day Two

## Module 6: Engaging with Customers

- Overview of multichannel communication in Zoho CRM
- Using email integration with CRM
- Using personalized email templates
- Managing phone calls from within CRM
- Chatting with prospects
- Interacting with prospects through social media

## Module 7: Sales Collaboration

- Sharing records with colleagues
- Using sales collaterals
- Collaborating with colleagues using feeds
- Using personalized email templates

## Module 8: Maximizing Sales Productivity - I

- Importance of sales productivity
- Advanced filters
- Macros
- Workflow operations

- Sales process flow

- Getting approval from managers

### Module 9: Sales Metrics

- Using reports

- Managing reports and dashboards

### Module 10: Using Extensions

- Overview of extensions

- Plug-in for MS Outlook

- Plug-in for MS Office

- Google Apps/Office 365 Integration

# Day Three

### Module 11: Team Selling

- Lead distribution methods

- Sales Quotas

- Forecasting

- Territory Management

### Module 12: Zia

- Zia Voice

- Zia Chatbot

- Best time to contact prospects

- Trends and anomaly detection

## Module 13: Maximizing Sales Productivity -II

- Understanding Sales processes
- Guiding your teams to execute a process with Blueprint
- Approving records

## Module 14: Sales Performance Management

- Customizing reports and dashboards
- Sales metrics
- Email metrics
- Real-time Insights (Motivator)
- Contests and score cards (Motivator)

## Summary

- A Day in the life of sales manager
- CRM - Best practices
- Sharing training experience
- What's next?

**ZOHO CRM**

For more information

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