Salesforce.com, Part 3: Importing, Manage a Team

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Prerequisites: This course assumes very little familiarity Salesforce.com. This course is part of 3 courses; Salesforce.com: Introduction; Salesforce.com: Leads and Dashboards; and Salesforce.com: Importing, Manage a Team. Please be sure to view the courses in order if you are new to the material.

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Course description: Salesforce.com is a customer relationship management (CRM) tool that allows you to manage contacts, and track sales activity including leads, sales, and customers. In this three part learning series, get to know Salesforce CRM concepts and user interface. Learn how to manage leads, work with contacts, and track sales opportunities. Make your sales data meaningful with existing or customized reports and Dashboards.

Course outline:

Importing
- Introduction
- Advanced Salesforce Overview
- Salesforce and Social Networks
- Import Accounts and Contacts
- Prepare Data for Importing
- Fields Not in Salesforce
- Running the Import
- Summary

Data.com, Configure Salesforce
- Introduction
- Using Data.com
- Data.com Prospector
- InsideView
- Creating Custom Views
- Sharing Views
- Configuring Salesforce
- Customize Your Tabs
- Reminder Preferences
- Email Signature
- Summary

Sales Cycle and Meetings
- Introduction
- Managing a Sales Team Overview
- Plan Your Sales Cycle
- Understanding Sales and Stages
- Advanced Process Tailoring
- Run Sales Meetings
- Sales Meeting Agenda
- Preparing Your Team
- Using Salesforce Dashboards
- Summary

Collaboration and Coaching
- Introduction
- Collaborate with Your Team
- Check Your Chatter Feed
- Other Collaboration Tools
- Identify Coaching Opportunity
- Dashboards for Coaching
- Reviewing Salesforce Records
- Best Practices
- Improving Salesforce
- Ongoing Training
- Summary