

## Zoho CRM: Critical User Skills (Second Edition)

### Course Specifications

**Course Number:** ELK91–621ol\_rev1.0

**Course length:** 1.0 day(s)

### Course Description

A Customer Relationship Management (CRM) system is most effective in building strong relationships with customers. You can now take advantage of the powerful and user-friendly features of Zoho's CRM to automate the sales processes within your organization.

This course will provide you with the knowledge and skills needed to use Zoho CRM in the real world. You will start using Zoho CRM by familiarizing yourself with the user interface and data components. To support the functioning of the sales process, you will manage inventory data, communication through emails, and repetitive tasks using macros. In addition to these functions, you will perform operations aimed at improving sales and enhancing customer satisfaction by performing marketing activities, customer support functions, and data analysis.

**Course Objective:** In this course, you will use Zoho CRM to improve your marketing, sales, inventory, and customer service business practices.

You will:

- Log in to Zoho CRM and customize user settings.
- Organize leads in the Zoho CRM sales process.
- Execute the sales process in Zoho CRM.
- Interact with leads and contacts via emails, calls, events, and social media.
- Simplify and automate Zoho CRM.
- Perform marketing activities in Zoho CRM.
- Manage the inventory in Zoho CRM.
- Finalize sales.
- Perform customer support functions in Zoho CRM.
- Analyze CRM data.

**Target Student:** This course is designed for end-users, who may be executives working in sales, marketing, inventory control, or customer support departments, and who may need to use a CRM system as part of their daily work. They may perform tasks such as tracking sales orders, managing leads, and converting leads to closed sales with the objective of increasing the sales of the organization.

Students may or may not be familiar with other Customer Relationship Management (CRM) systems and may be new to Zoho CRM.

**Prerequisites:** To ensure your success in this course, you should have a basic understanding of sales processes and techniques. You should also have basic end-user skills with computers and the Internet, and some experience with using cloud-based applications.

## Course Outline

You can obtain this level of skills and knowledge by taking the following Logical Operations courses:

- Using Microsoft® Windows® 8.1 or Microsoft® Windows® 8.1: Transition from Windows® 7
- Microsoft® Office 365™: Web Apps for End Users or Microsoft® Office 365™: Web Apps and Collaboration for Office 2013

## Hardware Requirements

For this course, you will need one computer for each student and one for the instructor. Each computer will need the following minimum hardware configuration:

- Processor: 1 gigahertz (GHz) or faster.
- RAM: 1 gigabyte (GB) (32-bit) or 2 GB (64-bit).
- Hard Disk Space: 16 GB (32-bit) or 20 GB (64-bit).
- Optical Drive: CD or DVD drive.
- Input Device: Keyboard and mouse (or other pointing device).
- Monitor: Any monitor that supports a 1,024 x 768 resolution is recommended.
- Network: Network cards and cabling for local network access.
- Graphics Card: Microsoft® DirectX® 9 graphics device with WDDM driver.
- Internet Connection: Internet connection is mandatory as Zoho CRM is cloud- based software.

You will also need a projection system to display the instructor's computer screen.

These specifications are the minimum requirements for running Microsoft® Windows® 8.1 on your system. You can also use Windows 7 or higher systems for the course environment.

## Software Requirements

Each computer should have the following software installed:

- Microsoft Windows 8.1
- Internet Explorer® 10 or higher
- Google Chrome™ with the latest update
- Microsoft® Excel®
- If necessary, software for viewing the course slides. (Instructor machine only.)
- Zoho CRM can run on Mac OS® and Linux® systems. However, this course has been tested only on the Windows platform. Zoho CRM can run on Mozilla Firefox® (latest update) and Apple Safari® 4 or higher. However, the activity steps have been tested only on Internet Explorer and Google Chrome.

## Course Content

### Lesson 1: Getting Started with Zoho CRM

- Topic A: Join the Zoho CRM Organization Account
- Topic B: Identify the Data Components of Zoho CRM
- Topic C: Customize User Settings

### Lesson 2: Organizing Leads in the Zoho CRM Sales Process

- Topic A: Identify the Stages in the Zoho CRM Sales Process
- Topic B: Create and Import Leads

## Course Outline

Topic C: Optimize the Importing Leads Process  
Topic D: View Import History  
Topic E: Customize the Leads Home Page Views

### **Lesson 3: Executing the Sales Process**

Topic A: Convert Leads After Evaluation  
Topic B: Create Accounts  
Topic C: Maintain Contact Information  
Topic D: Develop Potentials

### **Lesson 4: Interacting with Leads and Contacts**

Topic A: Documenting Interaction on a Lead or Contact Detail Page  
Topic B: Organize Activities and Create Tasks  
Topic C: Send Emails  
Topic D: Log Calls  
Topic E: Organize Events  
Topic F: Connect via Social Media

### **Lesson 5: Simplifying and Automating Zoho CRM**

Topic A: Create Macros  
Topic B: Create Simple Workflows

### **Lesson 6: Performing Marketing Activities in Zoho CRM**

Topic A: Create Email Marketing Campaigns  
Topic B: Track Email Marketing Responses

### **Lesson 7: Managing Inventory in Zoho CRM**

Topic A: Manage Vendors  
Topic B: Maintain Products  
Topic C: Complete Purchase Orders  
Topic D: Create Price Books

### **Lesson 8: Finalizing Sales**

Topic A: Create Sales Quotes  
Topic B: Prepare Sales Orders  
Topic C: Generate Invoices

### **Lesson 9: Performing Customer Support Functions in Zoho CRM**

Topic A: Create Cases  
Topic B: Implement Solutions

### **Lesson 10: Analyzing Zoho CRM Data**

Topic A: Generate Reports  
Topic B: Create Dashboards

### **Appendix A: The Zoho CRM Mobile Edition**