Salesforce.com® for Sales Representatives

Course Specifications

Course Number: ELK91-600_rev2.0
Course length: 1.0 day(s)

Course Description

Building strong relationships with your customers is the key to sales success. Salesforce® is a powerful tool that enables you to manage your customer relationships more effectively and efficiently—resulting in greater sales to new and existing customers. This course will give you the knowledge and skills you need to use Salesforce in the real world—ultimately enabling you to meet and exceed your sales targets.

Course Objective: In this course, you will use Salesforce CRM to increase your sales.

You will:

- Get started with the Salesforce environment.
- Optimize lead flow.
- Manage ongoing sales processes.
- Manage the opportunity pipeline.
- Streamline the sales process with reports and dashboards.

Target Student: Students taking this course are sales representatives who are managing their sales territories, with the goal of converting sales leads into sales opportunities and sales opportunities into closed sales. Students may be selling products or services. Students may or may not be familiar with other customer relationship management (CRM) systems and may be new to Salesforce 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.

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 and Collaboration for Office 2013

Hardware Requirements

For this course, you will need one computer for each student and one for the instructor. Salesforce CRM is an online application that can run on almost any computer. Internet access is required.

Software Requirements

Salesforce® supports the latest version of all major browsers. Browser Comments Google Chrome™, most recent stable version Google Chrome applies updates automatically. Salesforce.com makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Mozilla® Firefox®, most recent stable version Salesforce.com makes every effort to test and support the most recent version of Firefox. Microsoft® Internet Explorer® versions 7, 8, 9, 10, and 11 If you use Internet Explorer, use the latest version that Salesforce supports. Apply all Microsoft software updates. Apple® Safari®versions 5.x and 6.x on Mac OS X There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site. For this class, Microsoft Internet Explorer is preferred. For all browsers, you must enable JavaScript, cookies, and SSL 3.0. You should also allow pop-ups from secure sites.

Course Content

Lesson 1: Getting Started with Salesforce

Topic A: Set Up Salesforce Developer Edition
Topic B: Orientation to the Salesforce Interface
Topic C: The Sales Process

Lesson 2: Optimizing Lead Flow

Topic A: Identify Lead Sources
Topic B: View Existing Leads
Topic C: Manage Leads
Topic D: Perform Common Lead Activities

Lesson 3: Managing Ongoing Sales Processes

Topic A: Convert Leads
Topic B: Manage Accounts
Topic C: Manage Contacts

Lesson 4: Managing the Opportunity Pipeline

Topic A: Manage Opportunities
Topic B: Perform Common Opportunity Activities
Topic C: Close Opportunities

Lesson 5: Streamlining Your Sales Process with Reports and Dashboards

Topic A: View Reports
Topic B: View Dashboards

Appendix A: Extending Salesforce with AppExchange

Appendix B: Integrating Salesforce with Microsoft Office and Google Apps