

Zoho CRM: Critical User Skills

Course Specifications

Course Number: ELK91–620_rev1.0

Course Length: 1 day

Course Description

Overview: 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 increase your sales.

You will:

- Get started with Zoho CRM
- Organize leads in the Zoho CRM sales process
- Execute the sales process in Zoho CRM
- Manage emails and macros in Zoho CRM
- Perform marketing activities in Zoho CRM
- Manage the inventory in Zoho CRM
- 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 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.

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

- Using Microsoft® Windows® 8 or Microsoft® Windows® 8: 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 1024 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 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
- 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: Examine the Data Components of Zoho CRM
- Topic C: Customize User Settings

Lesson 2: Organizing Leads in the Zoho CRM Sales Process

- Topic A: Examine the Sales Process
- Topic B: Create Leads
- Topic C: Associate Lead Information with CRM Components
- Topic D: Customize the Leads Home Page

Lesson 3: Executing the Sales Process in Zoho CRM

- Topic A: Organize Activities
- Topic B: Convert Leads After Evaluation
- Topic C: Create Accounts
- Topic D: Maintain Contact Information
- Topic E: Develop Potentials
- Topic F: Create Forecasts

Lesson 4: Managing Emails and Macros in Zoho CRM

- Topic A: Send Emails
- Topic B: Create Macros

Lesson 5: Performing Marketing Activities in Zoho CRM

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

Lesson 6: Managing the Inventory in Zoho CRM

- Topic A: Manage Vendors
- Topic B: Maintain Products
- Topic C: Create Price Books
- Topic D: Create Sales Quotes
- Topic E: Prepare Sales Orders
- Topic F: Complete Purchase Orders
- Topic G: Generate Invoices

Lesson 7: Performing Customer Support Functions in Zoho CRM

- Topic A: Create Cases
- Topic B: Implement Solutions

Lesson 8: Analyzing Zoho CRM Data

- Topic A: Generate Reports
- Topic B: Create Dashboards

Appendix A: The Zoho CRM Mobile Edition