

# Zoho CRM: Advanced User Skills

## Course Specifications

**Course Number:** ELK91-622\_rev1.0

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

## Course Description

A customer relationship management (CRM) system is a helpful tool 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 marketing and sales processes within your organization.

This course will provide you with the knowledge and skills needed to use the advanced features of Zoho CRM in the real world. You will use Zoho CRM to improve your individual and team efficacy by designing advanced templates, using autoresponders, creating advanced workflows, collaborating with your colleagues with the Feeds module, and creating forecasts. In addition to these CRM functions, you will learn how integrations with other Zoho products and third-party applications can enhance Zoho CRM.

**Course Objective:** Upon successful completion of this course, you will be able to improve sales, marketing, and customer support efficiency through integrating advanced CRM features and other applications.

In this course, you will:

- Improve job task efficiency with Zoho CRM.
- Manage a team with Zoho CRM.
- Improve marketing with Zoho Campaigns, Google AdWords, and Zoho CRM.
- Build customer relationships with Zoho SalesIQ and Zoho CRM.
- Analyze CRM data with the Advanced Analytics Add-On.

**Target Student:** This course is designed for individuals who are experienced Zoho CRM users, who may be executives working in sales or marketing departments. These experienced users want or need to advance their skills in using advanced CRM features to improve efficiency, manage teams, and analyze key CRM metrics. In addition, these users want to develop enhanced functionality gained through integrations with other Zoho products, such as Campaigns, SalesIQ, or Reports, and with third-party applications such as Google AdWords.

**Prerequisites:** To ensure your success in this course, you should have practical experience using the sales, marketing, inventory, and customer support features of Zoho CRM.

You can obtain this level of skills and knowledge through real-world experience or by taking the Logical Operations course Zoho CRM: Critical User Skills (Second Edition).

## 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 × 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
- Firefox™ with the latest update
- Notepad++ HTML Text Editor
- Microsoft® Excel® (instructor machine only)
- 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: Improving Job Task Efficiency with Zoho CRM**

- Topic A: Join the Zoho CRM Organization Account
- Topic B: Design Advanced Templates
- Topic C: Create an Unsubscribe Form
- Topic D: Use Autoresponders for Marketing Automation
- Topic E: Implement Advanced Workflows

### **Lesson 2: Managing a Team with Zoho CRM**

- Topic A: Collaborate by Using Feeds
- Topic B: Use Assignment Rules to Maximize Team Efforts
- Topic C: Create Forecasts

### **Lesson 3: Improving Marketing with Zoho Campaigns, Google AdWords, and Zoho CRM**

- Topic A: Sync Zoho CRM and Zoho Campaigns
- Topic B: Create Targeted Email Campaigns
- Topic C: Analyze Google AdWords Campaign Effectiveness

### **Lesson 4: Building Customer Relationships with Zoho SalesIQ and Zoho CRM**

- Topic A: Use SalesIQ for Communication Background and Customer Alerts
- Topic B: Interact with Website Visitors
- Topic C: View Tracking Data from Zoho SalesIQ in Zoho CRM

### **Lesson 5: Investigating CRM Data with the Advanced Analytics Add-On**

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

### **Appendix A: Connecting Google Applications and Zoho CRM**