MOC 80546 A Sales Management in Microsoft Dynamics CRM 2013

Course Summary

Description

This course introduces the capabilities of Sales Management in Microsoft Dynamics CRM 2013 that allow you to track and manage the sales process from potential to close. This course provides insight on sales process information, and introduces the tools available to analyze and report on sales information. This course guides you through the tools that help make the internal processes simpler and easier so your sales force can focus on what is important—creating a differentiated experience for your customers.

Objectives

At the end of this course, students will be able to:

- Understand the context of Sales Management and review real-life sales scenarios
- Identify how the various elements of the Microsoft Dynamics CRM 2013 Sales fit together
- Review the basic terminology used throughout the application.
- Review how the basic flow of sales activity in Microsoft Dynamics CRM begins with the entry of leads, and review ways to manage leads in Microsoft Dynamics CRM
- Identify the role of leads, and when they can be used
- Know the Lead to Opportunity process and the roles of these records.
- Work with Sales Literature in Microsoft Dynamics CRM.
- Explore the steps to create and maintain Competitors.
- Identify the features and benefits of the product catalog.
- Create and maintain unit groups for the product catalog.
- Add products to the product catalog, and describe the use of kit products and substitute products.
- Create price lists and configure as appropriate for different customers, marketing campaigns and special offers.
- Set up different price lists for different types of customers and marketing campaigns
- Utilize the tools to available within Microsoft Dynamics CRM to capture important sales information and uncover new business opportunities.
- Identify how Goal Management enables organizations to manage and analyze performance.
- Use the Sales Analysis tools that Microsoft Dynamics CRM provides analyze and report on sales-related information

Topics

- Introduction to Sales Management
- Lead Management
- Working with Opportunity Records
- Working with the Product Catalog
- Sales Order Processing
- Metrics and Goals
- Sales Analysis

Audience

This course is course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organization. The training is intended for sales representatives, administrators, office managers, CEOs, and consultants who want to learn the available sales features within Microsoft Dynamics CRM 2013.

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- General knowledge of Microsoft Office
- An understanding of Customer Relationship Management solution processes and practices

Duration

One day

MOC 80546 A Sales Management in Microsoft Dynamics CRM 2013

Course Outline

I. Introduction to Sales Management

The Sales module within Microsoft Dynamics CRM provides a flexible framework for organizations to track, manage, and analyze parts of their sales cycle as well as its overall success.

This course describes the components used in Microsoft Dynamics CRM Sales Management and explains how they can apply to various business scenarios. It also details the entities or record types that Microsoft Dynamics CRM uses to track sales from potential to close. With this information, organizations can determine which aspects of the Sales module framework are appropriate for their organization

A. Customer Scenarios
B. Basic Record Types

II. Lead Management

This module introduces the tracking and management features of the Sales module in Microsoft Dynamics CRM. It is rare that two organizations follow the same sales process, even if the organizations are within the same industry. For this reason, Microsoft Dynamics CRM does not dictate a rigid process. Instead it provides a framework around which an organization can build a custom sales process.

This module describes the components of the Microsoft Dynamics CRM sales process. It also details the entities or record types Microsoft Dynamics CRM uses to track sales from potential to close. With this information, organizations can determine which aspects of the sales process framework are appropriate for them.

A. Lead to Opportunity Process Form and Process Ribbon
B. Convert Activity Records to Leads
C. Qualifying and Disqualifying Leads
D. Create, Maintain, and Use Sales Literature
E. Create, Maintain, and Use Competitors

Lab: Create and Disqualify a Lead

- Create a New Lead Record
- Disqualify the Lead Record.

III. Working with Opportunity Records

In Microsoft Dynamics CRM, qualified leads, such as those that have estimated revenue associated with them, become opportunities. When a prospect or customer expresses qualified interest in buying the business' products or services, that prospect or customer is considered an opportunity.

This is an important part of the sales process because this is where the sales team spends most of its time and effort. The process of working on an opportunity may include several customer interactions. How well the sales team manages this stage can mean the difference between a win and a loss.

A. Create Opportunities and Work with Opportunity Form
B. Changing Opportunity Status

Lab: Managing Sales Opportunities

IV. Working with the Product Catalog

This course describes the role of the product catalog in Microsoft Dynamics CRM and the benefits of using it. It shows the tasks that are required to configure a product catalog, including setting up and maintaining unit groups, products, and price lists. It also describes and demonstrates the important role of the product catalog and price lists in the sales process.

A. The Microsoft Dynamics CRM Product Catalog
B. Unit Groups
C. Adding and Maintaining Products
D. Creating, Maintaining and Using Price Lists
E. Currency Management
F. Creating a Price List

Lab: Managing Price List Items

- Create a Test Opportunity Record, and Add a Price List

Lab: Managing the Product Catalog

- Create Currency
- Create a Unit Group associated with the Currency
- Create a Product
- Create a Price List and Price List Item Tied to the Currency.

MOC 80546 A Sales Management in Microsoft Dynamics CRM 2013

Course Outline (cont'd)

V. Sales Order Processing

Microsoft Dynamics CRM provides tools that capture important sales information and uncover new business opportunities. Although quotes, orders, and invoices are important to the sales process and provide a complete view of the customer, implementing a sales process allows users to initiate, track, and close sales consistently and efficiently.

The product catalog in Microsoft Dynamics CRM helps companies build a central repository for managing products, services, charges, and fees. The tasks required to set up a product catalog include setting up and maintaining unit groups, products, and price lists. Microsoft Dynamics CRM also supports discount lists, which help companies provide customers with incentives to buy more products.

A. Adding Line Items (Opportunity Products) to Opportunities
B. Quote Management
C. Working with Orders
D. Working with Invoices

Lab: Sales Order Process

VI. Metrics and Goals

Microsoft Dynamics CRM uses two record types known as Goal Metrics and Goals. These record types combine to provide a powerful, flexible set of goal management features. Goal management allows organizations to track individual, team, and organizational progress toward specific goals.

A. Configuring Goal Metrics
B. Configuring Fiscal Periods
C. Creating and Assigning Goal Records
D. Creating and Recalculating Parent and Child Goal Records
E. Creating a Rollup Query

Lab: Goal Management for Individuals

- Implement a Goal Metric

VII. Sales Analysis

This module explains the tools that Microsoft Dynamics CRM provides to analyze and report on sales-related information.

A. Running Built-in Reports
B. Exporting Sales Information to Excel
C. Working with Charts and Dashboards
D. Working with System Charts from the Opportunity List
E. Working with Dashboards
F. Create a New Dashboard in the Workplace
G. Sharing DASHBOARDS, Charts and Advanced Find Queries

Lab: Create a New Personal, Sales Dashboard

- Create an advanced find query
- Create a chart.
- Create a dashboard, and add the advanced find query and chart to it.
- Share the dashboard