

Module Title : Sales Cloud Training for Sales Managers

Duration : 1 day

OVERVIEW

Sales Cloud Training for Sales Managers helps sales managers analyze and improve sales processes from lead assignment to deal closure. In this interactive course, discuss best practices and gain hands-on experience running sales reports, forecasting with realtime data, tracking quota attainment, and using productivity tools to successfully manage sales teams.

WHO SHOULD TAKE THIS COURSE?

This course is designed for professionals who manage sales teams. No prior knowledge of Salesforce is needed. However, it is recommended that all students take the online eLearning course Getting Started: Using the Sales Cloud that is available through Salesforce Help and Training.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Use Salesforce data to help your reps focus on the right leads, complete tasks, and close deals.
- Run reports to gain insight into your team's performance and fine-tune sales processes.
- Create dynamic dashboards to stay focused on what matters most.
- View your sales forecast, make adjustments to improve accuracy, and monitor quota attainment.
- Use tools such as Chatter and Salesforce1 to share information and stay connected from anywhere.

MODULES & TOPICS

Lead and Opportunity Management

- Understanding the lead lifecycle
- Viewing and assigning leads
- Qualifying and converting leads
- Managing opportunities through the sales process

Reporting

- Getting started with standard sales reports
- Customizing reports to refine your data
- Visualizing your data with charts and dashboards

Forecasting

- Understanding the capabilities of Collaborative Forecasts
- Choosing forecast types
- Adjusting the forecast
- Adding quota data

Getting the Most Out of Salesforce

- Dashboard best practices
- Managing to-dos with Activities
- Working as a team in Chatter
- Managing on the go with Salesforce1