



## Course Syllabus

### Microsoft CRM Sales Management

#### Key Data

**Course number:** 8521A

**Number of Days:** 1

**Available:** November 2005

**Languages:**

- US English

**Format:**

- Instructor-Led Training (lecture and labs)

**Student Materials:**

- Student Courseware

**Certification Exam:**

This course helps to prepare for the

**This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.**

**Course content, prices, and availability are subject to change without notice.**

**Key Related Courses:**

Microsoft CRM Installation and Configuration, 8526

Microsoft CRM Customization, 8525

Microsoft CRM Marketing Automation, 8522

Microsoft CRM Service Management, 8523

Microsoft CRM Service Scheduling, 8524

#### Introduction

This one-day course explores the Microsoft® CRM application from a user's perspective. Application functionality covered in the course includes Core CRM Navigation, User Interface, Outlook Client, and the Sales Management module. This application course does not include materials or instructor discussion of Microsoft CRM Installation, Application Configuration, Workflow Configuration, Customization, Back Office Integration or Data Migration.

This course teaches the processes and functionality used by sales managers and sales representatives. The course begins with an introduction to the core concepts of Microsoft CRM then an overview of the sales processes. Subsequent lessons explore the sales concepts in greater detail. A thorough understanding of the sales processes in Microsoft CRM helps you to get the most out of your system.

#### Audience

Microsoft CRM Sales Management training is recommended for individuals or anyone that plans to implement, use, maintain, consult, or support Microsoft CRM in their organization. The class is targeted toward sales representatives, administrators, office managers, CEO's, and consultants who need to understand the technical aspects of Microsoft CRM and gain foundational knowledge of the application functionality.

#### At Course Completion

After completing this course, students should understand:

- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronization
- Account, Contact, Lead, Opportunity and Activity record management
- Sales functionality, including Lead, Opportunity, Quote, Order, Invoice, and Product Catalog management
- Microsoft CRM Advanced Find functionality to evaluate customer data

#### Prerequisites

Before attending this course, students must have:

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

#### Student Materials

The student materials include comprehensive courseware and other necessary materials for this class.

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**For a referral to a Microsoft Certified Partner Learning Solution in your area, see the Microsoft Training and Certification Web site at <http://www.microsoft.com/traincert>. Call your local Microsoft Certified Partner Learning Solution for more information and to register for classes.**

## Chapter 1: Microsoft CRM Concepts

This chapter describes the overall solution of Microsoft CRM and the benefits to an organization. There is a brief overview of each of the available modules. The chapter also discusses the concepts, tasks, navigation, and functions that are used throughout the product.

<b>Main Topics</b>
<ul style="list-style-type: none"><li>▪ Microsoft CRM Modules</li><li>▪ Accessing Microsoft CRM</li><li>▪ Customer Records</li><li>▪ Customer Relationships</li><li>▪ Understanding customization availability</li></ul>
<b>Labs</b>
<ul style="list-style-type: none"><li>▪ Working with Records</li><li>▪ Accounts and Contacts</li></ul>

After completing this chapter, students should be able to:

- Understand the overall solution that Microsoft® Dynamics CRM® provides and the functionality and purpose of the Microsoft CRM modules
- Log on to Microsoft CRM
- Understand the relationship between account and contact records in Microsoft CRM
- Understand the types of relationships that can be created between records

## Chapter 2: Microsoft CRM Client for Outlook

This chapter takes a look at how the Microsoft CRM Client for Outlook works, how the functionality is similar to the web client. It provides information on how to work in the Outlook Client interface. The lesson begins by identifying the functionality available in the Outlook Client, and then discusses how to use the functionality.

<b>Main Topics</b>
<ul style="list-style-type: none"><li>▪ Identifying the functionality available in the Microsoft CRM Client for Outlook</li><li>▪ Navigate within the Microsoft CRM client for Outlook user interface</li><li>▪ Navigate within the Microsoft CRM client for Outlook user interface</li><li>▪ Create and manage Microsoft CRM records and activities in Outlook</li></ul>
<b>Labs</b>
<ul style="list-style-type: none"><li>▪ Synchronization in the Outlook client</li><li>▪ Outlook client Record management and E-mail management</li></ul>

After completing this chapter, students should be able to:

- Identify the functionality available in the Microsoft CRM Outlook client.
- Understand how to navigate the user interface of the Microsoft CRM Outlook client.
- Understand how the Outlook client synchronizes with Microsoft® Outlook® and the Microsoft CRM Server and also to how to take the Outlook client offline and online.
- Understand how to differentiate between Microsoft CRM and Outlook records and how the different record types are managed in the Outlook client.
- Understand how to create mail merge documents for the available record types in the Microsoft CRM Outlook client.

### **Chapter 3: Sales Management Life Cycle**

This chapter discusses a basic sales process starting with a lead that the user enters for an existing customer. The Sales Representative converts the lead to an opportunity and associates the lead with the existing customer. This lesson also discusses the relationship between accounts, sub-accounts, and contacts. The focus is on procedural introduction. Therefore, the sales process is completed but not discussed in great detail.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Sales Management Process Flow</li> <li>▪ Overview of core sales functionality</li> <li>▪ Working with Customer Records</li> </ul>
<b>Lab</b>
<ul style="list-style-type: none"> <li>▪ Microsoft CRM Process Flow</li> </ul>

After completing this chapter, students should be able to:

- Understand the sales process flow in Microsoft Customer Relationship Management.
- Complete an overview of the sales process including the following tasks:  
 Create a lead record using the Lead Form  
 Qualify and convert a lead to an opportunity  
 Create a quote, order, and invoice automatically from an opportunity

### **Chapter 4: Lead Management**

This lesson takes a look at a more complex sales process and discusses leads in great detail since this is a key point in the sales process. The lesson begins by importing leads then discusses the other activities related to leads.

<b>Main Topics</b>
<ul style="list-style-type: none"> <li>▪ Understanding Leads</li> <li>▪ Creating and Importing Leads</li> <li>▪ Assigning, Sharing and Converting Leads</li> <li>▪ Disqualifying and Reactivating Leads</li> <li>▪ Reporting with Leads</li> </ul>

<b>Labs</b>
<ul style="list-style-type: none"><li>▪ Managing and Creating Leads</li><li>▪ Assign a Lead</li><li>▪ Create Leads</li><li>▪ Qualify and Convert Leads</li><li>▪ Disqualify and Reactivate Leads</li><li>▪ Reporting with Leads</li></ul>

After completing this chapter, students should be able to:

- Understand the process for using Leads in Microsoft CRM
- Create leads using the lead form
- Import Leads into Microsoft CRM from a file
- Qualify leads and track communication activity and convert a lead to an opportunity
- Disqualify leads that will not result in sales and reactivate leads that have been disqualified
- View Reports associated with leads

## **Chapter 5: Completing the Sale**

This chapter continues the sales process that originated with a lead and focuses on working with opportunities. There is an in-depth discussion of the Work Flow process. An opportunity is tracked through the rest of the sales process including creating a quote, order, and invoice.

<b>Main Topics</b>
<ul style="list-style-type: none"><li>▪ Managing Opportunities</li><li>▪ Working with Opportunities</li><li>▪ Using Workflow and Sales Processes</li><li>▪ Quotes, Orders, and Invoices</li></ul>
<b>Labs</b>
<ul style="list-style-type: none"><li>▪ Manage Opportunities</li><li>▪ Apply a Sales Process Rule</li><li>▪ Process Quotes, Orders, and Invoices</li></ul>

After completing this chapter, students should be able to:

- Understand how to manage Opportunities to help generate sales
- Assign a rule using the Automated Sales Process to automatically create sales tasks and ensure a consistent sales process
- Convert an Opportunity to a quote and track the quote through the order and invoice phases

## Chapter 6: Sales Productivity

This chapter discusses additional features in Microsoft CRM that are used to analyze the data that is captured in the system. The Advanced Find function is used to run queries against the data to view information in various formats. The lesson also looks at marketing lists and quick campaigns.

<b>Main Topics</b>
<ul style="list-style-type: none"> <li>▪ Evaluating Customer Data</li> <li>▪ Creating and Saving Advanced Find queries</li> <li>▪ Managing Sales Productivity</li> <li>▪ Marketing Collaboration</li> </ul>
<b>Labs</b>
<ul style="list-style-type: none"> <li>▪ Creating and Saving Advanced Find Views</li> <li>▪ Sales Productivity</li> <li>▪ Sales Productivity Reports</li> <li>▪ Quick Campaigns</li> </ul>

After completing this chapter, students should be able to:

- Understand the type of information that you can analyze in Microsoft CRM
- Use the Advanced Find function to locate customers that meet specified criteria, save queries, and create Quick Campaigns
- Use Sales information to review potential opportunities to forecast revenue
- Use Microsoft CRM to analyze sales productivity
- Manage customer marketing lists

## Chapter 7: Sales Administration

This lesson covers the administrative concepts of Microsoft CRM at a high level. These are tasks that are used during the implementation of the product and periodically for maintenance.

<b>Main Topics</b>
<ul style="list-style-type: none"> <li>▪ Automated Sales and Workflow Processes</li> <li>▪ Managing Competitors</li> <li>▪ Managing Sales Literature</li> <li>▪ Creating a Product Catalog</li> </ul>
<b>Lab</b>
<ul style="list-style-type: none"> <li>▪ Manage Competitive Information</li> </ul>

After completing this chapter, students should be able to:

- Understand how to use sales processes and workflow rules
- Add information regarding Competitors
- Manage sales literature items and attach documents to records
- Maintain the product catalog including price and discount lists