Maximizer CRM 10 Opportunities Course T102

Who is this course designed for?

- Sales Team Leaders and Managers using Maximizer CRM 10 who want to be able to utilise the sales pipeline management functionality of Maximizer CRM 10 (All Editions (except Entrepreneur) Group, Professional and Enterprise).
- **Recommended Pre-requisites: Maximizer CRM User Training (Course T101).**
- Please note – this course is based on a workshop format.

What is the course objective?

This course, based around a workshop aims to provide Sales Managers with enough knowledge to set-up and configure a Sales Opportunity tracking system within Maximizer CRM 10 back at their own offices and to train their own users in the basic operational use of this component of the system.

The workshop is based on a fictitious company, Sunshine Furniture Products who operate, both, a direct and indirect sales channel and covers configuring the system to support both channels operationally and managerially including simple reporting techniques to help you gain the most from the system. It is assumed that all delegates will have previous experience of using the Maximizer CRM 10 Address Book functionality and have an understanding of the sales processes in place at their own organisation.

What will you learn?

This course contains the following lessons and modules.

- Understanding Sales Opportunities – why we use them, when to create them.
- Team Organisation – setting up sales teams that will work together on opportunities.
- Opportunity profiling and sales forecasting as a concept.
- User defined fields – how to set up user defined fields to help you track actions and other information related to an opportunity to construct your opportunity profile effectively.
- Creating and updating simple opportunities (operational aspects for your staff).
- Developing an opportunity model for your business (group session) exploring what elements of the methods discussed maybe suitable for your individual businesses and creating a base model to implement back at the office.
- Configuring the Opportunity system – creating a stages list, understanding products and categories and assigning success factors and completion reasons.
- Reporting on Opportunities – a review of the standard reporting options available in the product. Generating your own column reports and exporting data to Excel for offline analysis.
- Understanding strategies and creating a basic sales strategy.

This is a standard course using a sample data set. All course delegates are provided with a set of instructional reference notes with sufficient space for note taking and a binder to store them in. Delegate understanding is reviewed throughout however due to the custom nature of content coverage is not examined at the end of the session.

Where is this course delivered?

- This course is delivered at the Head Offices of C.A.B.C. Limited in Newbury, West Berkshire (joining instructions and a map to our location will be sent to all delegates). We can accommodate up to six delegates per course.

How long is this course?

- This course lasts 6 hours and runs from 0930hrs to 1630 hrs including breaks and lunch..

When does this course run?

- We run this course 4 times a year (on average once every three months). You can check the date of the next course by reviewing the CABC events calendar and looking for course T102.

For more information, pricing or to make a booking please contact CABC Sales on (01635) 570970 or visit the, [CABC CRM Shop] to buy online.