



## Agenda

### Curriculum Highlights:

- Microsoft Dynamics CRM Concepts
- Microsoft Dynamics CRM Client for Outlook
- Sales Management Life Cycle
- Lead Management
- Completing the Sale
- Sales Productivity
- Sales Administration



**Microsoft** Partner

Silver Enterprise Resource Planning  
Silver Customer Relationship Management  
Silver Midmarket Solution Provider

## Synopsis:

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 course teaches the processes and functionality used by sales managers and sales representatives.

## By actively participating in this class, you should learn:

- Basic and advanced navigation and record maintenance
- Microsoft Dynamics 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 Dynamics CRM Advanced Find functionality to evaluate customer data

## Who Should Attend?

This class is targeted toward sales representatives, administrators, office managers, CEO's, and consultants who need to understand the technical aspects of Microsoft Dynamics CRM and gain foundational knowledge of the application functionality.