PROFESSIONAL ADVANTAGE LEARNING & DEVELOPMENT

Microsoft Dynamics AX

CRM

Manage your greatest resource more efficiently…

Learn how to keep and grow customers by gathering all of the company's business information and keeping it structured and easily accessible. Discover how you can track leads and opportunities and assign tasks to sales staff for timely follow-up.

Duration: Full Day
Cost: $1500 + GST + Travel
Additional Manuals +$50 per attendee

Who Should Attend:
- Anyone who has direct contact with customers, including sales and customer service personnel.

Pre-Requisites:
- Windows knowledge

- Introduction to CRM.
- Define rules for each step in the lead qualification process. Record information about a lead and track each step in qualification process.
- Learn how to collect information on prospects. Create, develop, and close sales.
- Define sales processes. Capture and document details of processes.
- Discover how to speed up data entry by importing external lists, contacts and leads and create targeted campaigns faster.
- Look at defining responsibilities to help in the coordination of efforts. Assign activity deadlines to correct date/time for each user.
- Review the use of Enterprise Portal to increase efficiency by allowing access to information regardless of location.
- Examine the Global Address Book and how it simplifies the sharing of customer, vendor and other information across entities in the organisation.
- Discover Global Address Book functionality.

Professional Advantage training is costed in either half or full day sessions. Half day (approx 4 hrs) and full day (approx 7.5 hrs) training sessions may vary in length depending on competencies required by the customer. Room hire available upon request.

For additional information regarding this course, please email mstraining@pa.com.au