



Course Aim

The aim of the Business Centre Training Course is to provide the attendee with the ability to record and manage all business contact and opportunities.

Pre-requisites

No specific training is required prior to this training course. However, it would be advantageous if you have a basic understanding of the Internet and web browser technologies and any type of portal.

Suggested Attendees

This course is intended to provide an overview of the system for management level users and detailed knowledge of the processes and functionality of the Business Centre for end users.

Course Content

Contact Management

- Creating/viewing/managing Contacts
- Identifying Contact types & relationships
- Recording Qualifications & Employment
- Managing Contact Activities

Account Management

- Creating/viewing/managing Accounts
- Identifying Account types & relationships
- Managing Contact Activities
- Identifying Products

Leads & Opportunities

- Creating/viewing/managing Leads
- Managing Lead Activities
- Lead Conversion

Sales Lead Routing

- Progressing the Lead / opportunity through to successful completion

Course Objectives

The attendee will obtain the skills to successfully record and manage contacts and accounts, and to manage the process of leads and opportunity through to successful completion by understanding the relevant functional areas of Agresso CRM.

Methodology

An overview of the system setup functionality of Microsoft CRM, which is followed up by hands on training provided by the course leader to reinforce all aspects of the training.

Duration

1 day
From 10.00 a.m. - 16.30 p.m.

Location

Agresso's Swansea Training
Centre or customer site

Cost

POA - dependant on location.

