Sales Cloud Training for Sales Reps

Duration
1 day offered as four 1.5-hour modules

Delivery Format
Classroom or virtual classroom

Audience
Sales Representatives

Sales Cloud Training for Sales Reps is a must for Sales Representatives who are new to Salesforce Sales Cloud and need to quickly get up to speed on its productivity tools. Sales Reps will learn how to use the Sales Cloud to prospect for clients, manage accounts and opportunities, manage their workflow, communicate with clients, and run reports. This course is structured in a modular format and adds up to one full day of content.

Who should take this course?

Sales Cloud Training for Sales Reps is designed for:

- Sales Representatives who are new to using Salesforce Sales Cloud

What you will learn

When you complete this course, you'll be able to:

- Navigate Salesforce.
- Find and add information related to accounts, contacts, leads, opportunities, and activities.
- Use Salesforce to manage and track sales activities.
- Enter information into Salesforce so managers can accurately forecast and analyze sales.
- Customize Salesforce list views and reports to manage and analyze contact and account information.
- Use Salesforce1 on a mobile device

Register today at www.salesforce.com/training

Sales Cloud Training for Sales Reps

Modules & Topics

Introduction to Salesforce: Managing Your Accounts and Contacts

Get Started in Salesforce

- Use List Views to Filter, Follow, and Edit Information
- Use Reports to Analyze Your Accounts
- Research What's Happening with Your Accounts
- Use Chatter to Get More Information
- View Current News About Your Accounts in Salesforce1
- Create New Accounts and Contacts
- Sell Collaboratively with Account Teams
- Use Reports to Track At-Risk Accounts

Effective Prospecting: Lead and Opportunity Management

- Locate and Enter Leads in Salesforce
- Use List Views to Organize and Prioritize Leads
- Update Lead Status to Track Your Progress
- Convert Qualified Leads to Accounts, Contacts, and Opportunities
- Track Opportunities Through the Sales Process
- Add Products to Opportunities
- Find Information in Salesforce to Close Deals
- Sell collaboratively with Opportunity Teams
- Report on Leads and Opportunities

Sales Productivity: Streamlining Your Day

- Use Tasks to Track Calls, Emails, and To-Dos in Salesforce
- Use Events to Schedule and Track Meetings in Salesforce
- Locate, Add, and Complete Activities in Salesforce1
- Tour the Today App in Salesforce1
- Send Email Directly from Salesforce
- Save Time with Standard and Custom Email Templates
- Analyze your Sales Activities with Reports

Reporting: Track Your Deals

- Work with Standard Reports
- Customize Reports
- Modify Report Options
- Use the Report Builder for Deeper Customizations
- Apply Report Filters and Filter Logic
- Summarize Your Data in Reports
- Add Charts to Reports
- Use Dashboards to Visualize Data

About Salesforce University

Salesforce University offers a comprehensive catalog of courses and certifications to help you administer, develop, and use your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

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Phone: 1-800-789-984
Email: apactraining@salesforce.com

EMEA:
www.salesforce.com/eu
Phone: +353-1440-3333
Email: trainingEMEA@salesforce.com