



Sales force Course Content:35-40hours

Course Outline

Unit 1: About this Course

- Course Objectives
- About Rainmaker Associates
- How the course is structured

Unit 2: Get your Head in the Clouds! - A Salesforce.com Primer

- Benefits of using Salesforce.com
- Getting the most out of Salesforce.com
- What is Salesforce.com
- Navigating the Salesforce.com User Interface

Unit 3: Leads - Enter, Track, Qualify, Convert

- Introducing Leads
- Managing your Leads Process
- Working with Lead Field Mapping and Queues

Unit 4: Account Management

- Introducing Accounts
- Creating Accounts
- Working with Account Fields
- Using Related Lists

Unit 5: Contact Management

- Working with the Contact-Account Relationship
- Entering Contacts
- Using Campaigns to Group Contacts



Unit 6: Opportunities - Taking Control of your Sales Process

- Tracking your Sales
- Managing your Sales Process
- Working with Campaigns
- Using Products to Better Define the Sale
- Knowing who is Involved in the Opportunity
- Using Partner Roles

Unit 7: Activities - Driving Collaboration and Intelligence Gathering

- Introducing Activities
- Understanding how Activities Relate to Accounts
- Entering Activities
- Working with Emails
- Completing Tasks

Unit 8: Getting Info Out of Salesforce: Views, Reports, Dashboards

- Introducing Views, Reports, and Dashboards
- Working with Views
- Working Efficiently on the Reports tab
- Working with Dashboards

Unit 9: The Big Picture

- Does YOUR Salesforce Fit YOUR Business
- Extending Functionality
- Managing Salesforce in your Organization
- Driving User Adoption