SALES CLOUD TRAINING FOR SALES MANAGERS IN LIGHTNING EXPERIENCE

OVERVIEW
Sales Cloud Training for Sales Managers in Lightning Experience helps sales managers analyze and improve sales processes from lead assignment to deal closure. In this interactive course, you will discuss best practices and gain hands-on experience running sales reports, forecasting with real-time data, tracking quota attainment, and using productivity tools to successfully manage sales teams.

WHO SHOULD TAKE THIS COURSE?
This course is designed for professionals who manage sales teams and are using the Lightning Experience. No prior knowledge of Salesforce is needed. However, it is recommended that you first take the online eLearning course Getting Started with Sales Cloud, which is available through Salesforce Help and Training.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:
• Use Salesforce data to help your reps focus on the right leads, complete tasks, and close deals.
• Run reports to gain insight into your team’s performance and fine-tune sales processes.
• Create dynamic dashboards to stay focused on what matters most.
• View your sales forecast, make adjustments to improve accuracy, and monitor quota attainment.
• Use tools such as Chatter and Salesforce1 to share information and stay connected from anywhere.

PREREQUISITES
• None. Online eLearning course Getting Started with Sales Cloud available through Salesforce Help and Training recommended.
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MODULES & TOPICS

Lead and Opportunity Management
- Understanding the Lead Lifecycle
- Viewing and Assigning Leads
- Qualifying and Converting Leads
- Managing Opportunities Through the Sales Process

Forecasting
- Understanding the Capabilities of Collaborative Forecasts
- Choosing Forecast Types
- Adjusting the Forecast
- Adding Quota Data

Reporting
- Getting Started with Standard Sales Reports
- Customizing Reports to Refine Your Data
- Visualizing Your Data with Charts and Dashboards

Getting the Most Out of Salesforce
- Dashboard Best Practices
- Managing To-Dos with Activities
- Working as a Team in Chatter
- Managing on the Go with Salesforce1