



SALES MANAGEMENT SOLUTION



CRM ACCELERATOR IN 5 DAYS

XRMVISION.COM

Enhance your CRM usage to unleash your full sales' potential.

Your CRM solution is not being used to its full potential? Our 5-Day Accelerator Workshop will equip your sales managers, so they can take advantage of the full power of Microsoft Dynamics 365 Customer Engagement for Sales. Together, we will analyze and improve your current processes, and above all, configure your CRM solution. This will integrate your sales and support processes within your existing CRM solution.

Benefits:

- ◆ Eliminate the use and continuous updating of Excel sheets
- ◆ Increased understanding of each step of the sales cycle by your representatives
- ◆ Daily management of sales opportunities, according to the established criteria
- ◆ Overview of key sales performance indicators (KPIs) in dashboards
- ◆ Optimized cross-selling and up-selling strategies via CRM
- ◆ Effective management of the territories and the allocation of accounts receivable
- ◆ Allocation and monitoring of objectives and sales budget per individual

SCHEDULE

- ◆ Day 1
 - Interviews and workshops with management to better understand the reality of the business
 - Process and sales cycle analysis
 - Review of the practices and procedures related to the management of opportunities
 - Review of cross-selling and up-selling strategies
- ◆ Day 2
 - Analysis of the key performance indicators (KPIs)
 - Review of territories and allocation of accounts and prospects
 - Analysis of budgets and sales objectives
- ◆ Day 3
 - Configuration of features and customization of forms in the CRM
 - Configuration of automation and business processes
 - Dashboard creation for sales managers



- ◆ Day 4
 - Data import
 - Tests and adjustments to configurations
- ◆ Day 5
 - Training of users
 - Individual coaching for managers

DELIVERABLES

A CRM solution that allows you to better track activities and sales opportunities

An integrated and adapted process for the management of leads and opportunities

Automation that accelerates and makes sales activities more efficient

A dashboard with key performance indicators for sales managers

Users trained in the use of CRM in a management mode

Founded in 2008 in Montreal, XRM Vision is a human-sized CRM consulting firm driven by expertise and commitment. We specialize ourselves in creating and implementing Customer Relationship Management solutions, powered by the Microsoft Dynamics 365 universe.

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