

CRM Basics: Unlock Business Growth through Relationships

GoSkills online course syllabus

Skill level

Beginner

Lessons

18

Pre-requisites

No prior experience needed

Video duration

49m

Estimated study time

49m 48s

Instructor

Dan Moyle

Introduction

1

Nurture customer relationships

Ensuring you and your sales team are delighting prospects and customers is critical.

Set Your CRM Stage

2

Plan your CRM setup

Dirty data will cost your business dearly.

3

Data management 101

Managing your data for consistent reporting is critical. After this lesson, you'll be able to explain how data points interact with each other.

4

Plan for data imports

Whether you're moving from one system to another, or starting over, knowing how to plan for data imports will make life easier later.

5

Define the sales process

A good process helps everyone with consistency and efficiency.

Leverage Tools for Customer Centricity

6

Increase team efficiency

An efficient sales team is the dream.

7

Build seamless automations

Sequences and workflows in CRM programs further increase efficiency for sales teams.

8 **Create brand consistency**
CRM tools can be helpful when it comes to creating brand consistency.

9 **Organize your sales pipeline**
A deal or opportunity object in your CRM is critical.

10 **Build a customer-centric CRM**
Customers want to be seen.

11 **Leverage surveys**
Want to begin to understand how your work is paying off?

12 **Delight your customers**
The thread that binds: After this lesson, you'll be able to recognize the thread of customer delight and how it's integrated throughout each of the CRM tools.

Build CRM Reports

13 **Measure what matters**
Before building reports, it's important to align on key performance indicators.

14 **Map important properties**
When data has the right labels, you can move fast and with confidence.

15 **Build basic sales reports**
Whether you're building a report for yourself, a boss, or your team, building basic sales reports starts here.

16 **Perform accurate forecasting**
An accurate sales pipeline can help ensure successful forecasting for a business. After this lesson, you'll be able to perform accurate forecasting.

17 **Tell your reporting story**
A good dashboard adds superpowers to storytelling in analytics.

Conclusion

18

Next steps

Thank you for watching this course!

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