CRM System New Employee Training Outline

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1. Introduction

- Overview of the CRM System
- Purpose and Goals of Using CRM
- Key Features and Benefits

2. User Access & Security

- Logging In and Account Setup
- Role-Based Permissions
- Security Best Practices

3. Navigation & Layout

- Dashboard Overview
- Menu Structure
- Finding Records & Quick Search

4. Managing Contacts and Accounts

- Adding New Contacts & Accounts
- Editing and Updating Records
- Organizing with Tags & Notes

5. Tracking Activities

- Logging Calls, Emails, and Meetings
- Scheduling and Reminders
- Activity History

6. Managing Sales Pipeline

- Creating and Managing Opportunities
- Stages and Status Updates
- Forecasting & Reporting

7. Reporting and Analytics

- Viewing Standard Reports
- Customizing Reports
- Interpreting Data

8. Support and Troubleshooting

- Accessing Help Resources
- Contacting the Support Team
- FAQs

9. Q&A / Feedback

- Open Discussion

- Suggestions for Improvement