Structured CRM Workflow Training Script

1. Introduction

- Purpose: Guide team in using the CRM system efficiently.
- Objectives: Understanding stages, tasks, and best practices in CRM workflow.

2. Overview of CRM Workflow

The CRM workflow is made up of several key stages:

1. Lead Capture
2. Lead Qualification
3. Contact Engagement
4. Opportunity Management
5. Closing & Follow-up
6. Reporting & Analysis

3. Step-by-Step Instructions

Step 1: Lead Capture

- Enter new leads using the "Add Lead" feature.
- Ensure accurate and complete data entry.
- Assign leads to appropriate team members.

Step 2: Lead Qualification

- Qualify leads based on criteria: contact info, needs, potential.
- Update lead status accordingly.

Step 3: Contact Engagement

- Initiate communication via email or phone.
- Document interactions in the CRM notes section.
- Schedule follow-ups as tasks.

Step 4: Opportunity Management

- Convert qualified leads into opportunities.
- Track progress through sales stages.
- Attach relevant documents and proposals.

Step 5: Closing & Follow-up

- Update the opportunity as "Closed - Won" or "Closed - Lost".
- Send confirmation or feedback requests to the client.
- Document closing notes for future reference.

Step 6: Reporting & Analysis

- Generate regular reports on key metrics.

- Review pipeline health and conversion ratios.

4. Best Practices

- Update CRM data in real-time.
- Maintain clear and concise notes.
- Review CRM tasks daily.
- Keep data accurate for reporting.

5. Q&A and Support

- Refer to the CRM manual for further guidance.
- Contact the CRM admin or support team for assistance.