

## **GOLDMINE SALES MANAGEMENT TRAINING**

### **CLASS OUTLINE**

#### **ACCOUNT MANAGEMENT**

##### **WORKING WITH YOUR SALES DATABASE**

- DATA ENTRY BEST PRACTICES / TIPS & TRICKS
- ONE VS. MANY CONTACT RECORDS – WHEN & WHY
- WHEN ORG TREES CAN MAKE A DIFFERENCE
- OTHER WAYS TO TRACK ACCOUNT RELATIONSHIPS

##### **MANAGING TERRITORIES**

- SEGMENTING THE DATABASE
- CREATING & MODIFYING TERRITORY ASSIGNMENTS

#### **SALES OPPORTUNITY MANAGEMENT**

##### **PIPELINE TRACKING**

- SALES CYCLE & COMPLEXITY CONSIDERATIONS
- DECIDING BETWEEN THE OPPORTUNITY MANAGER & FORECAST
- USING THE OPPORTUNITY MANAGER

##### **PIPELINE MEASUREMENT TOOLS**

- SALES FUNNEL MEASUREMENT ALTERNATIVES
- FORECAST & QUOTE ANALYSIS
- BUILT-IN PIPELINE REPORTING CAPABILITIES
- USING EXCEL TO MEASURE PIPELINES
- SHARING INFORMATION WITH NON-GOLDMINE USERS

**Duration:** 2 hours

**Fee:** \$199/person

#### **“COACHING” OR “COAXING” YOUR TEAM**

##### **COORDINATING “TEAM” ACTIVITIES**

- GETTING THE WORD OUT
- SCHEDULING STAFF MEETINGS
- REVIEWING MULTIPLE CALENDARS AT ONCE
- USING ACTION DELEGATION TECHNIQUES

##### **USING MEASUREMENT TOOLS**

- ACTIVITY & RESULTS CODES – WHAT ARE THEY FOR?
- ACTIVITY ANALYSIS
- BUILT-IN & CUSTOM ANALYSIS REPORTS

##### **COACHING TOOLS**

- “REAL TIME” LOG – WHAT IS IT FOR?
- MEETING YOUR SALES REPS PERSONAL NEEDS

#### **CENTRALIZED SALES INTELLIGENCE**

##### **TRACKING DOCUMENTS & EMAILS**

- LINKING DOCUMENTS TO ACCOUNTS
- LINKING INCOMING & OUTGOING E-MAIL
- INTEGRATION WITH MS OUTLOOK

##### **BUILDING A SALES INFORMATION LIBRARY**

- HOW TO BUILD IT & WHAT IT SHOULD INCLUDE
- CATEGORIZING INFORMATION
- BUILDING A PERSONAL LIBRARY JUST FOR YOU