

## **GOLDMINE SALES REP "DAY IN THE LIFE OF" TRAINING**

### **CLASS OUTLINE**

#### **ACCOUNT MANAGEMENT**

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

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

#### **PRIORITIZING / MANAGING YOUR DAY**

##### **ACTION MANAGEMENT**

- SCHEDULING & COMPLETING ACTIVITIES
- EFFECTIVE FOLLOW-UP MANAGEMENT
- USING YOUR ACTIVITY LIST
- CALENDAR – VIEWING & PRINTING
- REPORTS TO PREPARE FOR SALES CALLS

#### **MANAGING YOUR SALES PIPELINE**

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

- FORECASTING SALES
- OPPORTUNITY MANAGER – WHEN TO USE IT
- REVIEWING YOUR SALES PIPELINE
- REPORTING OPTIONS

**Duration:** 1.5 hours

**Fee:** \$99/person

#### **WRITTEN COMMUNICATION**

##### **DOCUMENTS & EMAIL**

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

##### **TEMPLATES**

- WORD DOCUMENT TEMPLATES
- EMAIL MESSAGE TEMPLATES
- ORGANIZING YOUR TEMPLATES

##### **USING A SALES INFORMATION LIBRARY**

- HOW TO ACCESS THE INFO CENTER
- QUICK SEARCH OPTIONS
- MERGING INFORMATION INTO GOLDMINE EMAILS
- BUILDING A PERSONAL LIBRARY JUST FOR YOU