



ART03 - NetSuite CRM and Sales Management Training Course

Course Overview

This is a comprehensive designed for the senior who will have as their primary responsibility the operation and maintenance of the Sales and CRM Operation functions within Netsuite. It will deliver the knowledge required so that Netsuite will help meet the need to improve sales performance and customer relationships.

You should be sending someone if ...

- You are embarking on a new NetSuite implementation as having at least one project team member attend this course prior to the implementation will deliver substantial in-house capability that will ensure that the full range of Netsuite Sales and CRM functions are considered when determining how Netsuite can best assist this vital function; or,
- You have had staff changes that have resulted in a new senior Sales management who need to become fully aware of the sales and CRM capabilities of Netsuite
- You feel you should be taking advantage of more of the exception Sales and CRM functions of Netsuite and need Senior Sales management to be the lead agents for this.

The attendee will be learning:

- Setting up core aspects that provide the foundation for the full NetSuite CRM ecosystem.
- Processes available in the Lead capture and assignment process
- Configuring and managing the Pipeline process
- Sales Teams and Sales Rep activity tracking
- Reporting Analytics and Dashboard configuration

Course Location

The course can be held:

- On the client site, with a minimum of two attendees.
- At the AVT Training facility as part of a private course with a minimum of two attendees.
- At the AVT Training facility as part of a public course.

Fees and Deliverables

Each attendee will be provided with:

- A digital Workbook to be used during the course.

Please note that users should bring their own laptops for the course; WiFi access will be provided.

Costs

AUD \$3,200 per attendee

Related Courses

- **Marketing Campaigns** - 1 day course on creating and operation of marketing campaigns within Netsuite. Manage email and other types of campaigns with post campaign analysis and profitability reporting
- **Case Management** - 1 day course on establishing a customer service response team to react to customer issues. The functionality includes tracking of all communications, automated assignments to support staff and escalation processes
- **Promotions** - 1 day on the setup and operation of the Netsuite Advanced Promotions module. Promotions range from basic price markdowns, discounts on transaction totals, and complex buy one, get one or mix and match offers. You can analyze the sales generated from promotions in NetSuite, both while the promotion is running and when it has finished.

Agenda

Day 1 Sales Management	Day 2 Processes
<p>Lead Capture</p> <ul style="list-style-type: none"> Data Capture <ul style="list-style-type: none"> Online Form Data Entry Mobile App CSV <p>Lead Assignment (Sales Force Automation)</p> <ul style="list-style-type: none"> Territories Rules Reassignment Notifications <p>Quotas</p> <ul style="list-style-type: none"> Setting Quotas Team Selling <p>Pipeline Management</p> <ul style="list-style-type: none"> Customer Status Sales Preferences Opportunity Management Conversion to Quote Conversion to Sale Mobile App <p>Forecasting</p> <ul style="list-style-type: none"> Forecasting Preferences Sales Rep Forecast Update Sales Manager Forecast Update Forecast Reporting <p>Dashboards</p> <ul style="list-style-type: none"> Sales Rep Dashboards Sales Manager Dashboards 	<p>Entity Management</p> <ul style="list-style-type: none"> Entity Types Duplicate Detection <p>CSV Data Loading</p> <ul style="list-style-type: none"> Importing Leads Updating Entities <p>Activity Management</p> <ul style="list-style-type: none"> Events Tasks Phone Calls Email Integration <p>Sales Campaigns</p> <ul style="list-style-type: none"> Contact Groups Campaign Templates Campaign Execution Campaign Reports <p>Reporting and Analytics</p> <ul style="list-style-type: none"> Searches Reports Dashboards