EDTECH DIRECT

# Outlook for Sales Professionals

Many sales executives use Microsoft Outlook for email, but overlook the customer management features. Sales professionals can use Outlook as a powerful tool for managing customer relationships and developing business opportunities. This workshop visits each step of the sales cycle, and at each step shows you how to organize and record customer information in Outlook.

After this workshop participants can expect to:

- use Outlook to manage the sales process;
- spend just 20-30 minutes a day organizing contact files;
- collect data from daily call activity in one place.

**LENGTH: 1 DAY | START TIME: 9:00AM - 4:00PM | WORKSHOP ID: 33 | PRICE: $350.00 + GST/PERSON, $1500/DAY**

# Training Outline

### CREATE CONTACT LISTS
- Create new records
- Enter information correctly
- Move around in Outlook

### IDENTIFY SUSPECTS
- Create call lists
- Classifying suspects
- Group opportunities

### CATEGORIZE CONTACTS
- Using categories
- Categorized activities
- Edit and delete categories

### MAKE INITIAL CONTACT
- Scheduling contact visits
- Recording cold calls
- Recording decision-makers
- Tracking buyer information
- Recording calls & meetings

### KEEP TRACK OF CALLS
- Create a phone blitz
- Making call notes
- Create a phone call report

### COMMUNICATING
- Create a form letter
- E-Mail merge form letters
- View email history

### QUALIFY INTEREST
- Tracking opportunities
- Noting 30, 60, 90 day prospect
- Call lists and follow-up
- Flag and date follow-ups

### CALLS, MEETINGS, & TO-DOS
- Forecasting
- Managing Tasks
- View a contact's history
- Record & clear activities
- Taking quick notes

### MANAGE REQUIREMENTS
- Booking prospect meetings
- Record buying needs
- Record evaluation criteria
- Record decision makers
- Record buying time frame

### TIME MANAGEMENT
- Set schedule preferences
- Scheduling appointments
- Scheduling activities
- Customize reminders
- Print your calendars

### SALES REPORTS
- Create win/loss reports
- Sales call reports
- Group reports

### MANAGE SOLUTIONS
- Use contacts in proposals
- Link proposal to contacts
- Present Proposals by Email
- Schedule trial resources
- Book follow ups

### SALES TRACKING
- Enter sales opportunities
- Update sales progress
- Reopen a sale
- Close and reopen a sale

### CLOSE ORDER
- Record negotiations
- Record results of sale
- Record order details
- Track success rates

### MANAGE SOLUTIONS
- Schedule follow-ups
- Book a follow-up strategy
- Record sales progress
- Track new opportunities

### SORT AND FILTER
- Filter opportunities
- Edit multiple records
- Search for old contacts

# Who should attend

This is a workshop for sales executives and sales administrative staff who use Outlook for email but do not yet use it to record customer sales activities. We assume you have a working knowledge of Outlook and the ability to send and receive email. We require that you have basic windows skills before attending.

## Call Now or Visit Our Website to Register

| | |
|---|---|
| **Toronto** | **(416) 929-8324 (Option 1)** |
| **Toll Free** | **1800-654-3251** |
| **Register Online** | **http://www.edtech.ca/course.asp?id=33** |