Goskills

CRM Basics: Unlock Business Growth through Relationships

GoSkills online course syllabus

Skill level	**Lessons**	**Accredited by**
Beginner	18	Verified by GoSkills

Pre-requisites	**Video duration**	**Estimated study time**
No prior experience needed	49m	49m 48s

Instructor

Dan Moyle

Introduction

1   Nurture customer relationships

Ensuring you and your sales team are delighting prospects and customers is critical.

Set Your CRM Stage

2   Plan your CRM setup

Dirty data will cost your business dearly.

3   Data management 101

Managing your data for consistent reporting is critical. After this lesson, you'll be able to explain how data points interact with each other.

4   Plan for data imports

Whether you're moving from one system to another, or starting over, knowing how to plan for data imports will make life easier later.

5   Define the sales process

A good process helps everyone with consistency and efficiency.

Leverage Tools for Customer Centricity

6   Increase team efficiency

An efficient sales team is the dream.

7   Build seamless automations

Sequences and workflows in CRM programs further increase efficiency for sales teams.

8   Create brand consistency

CRM tools can be helpful when it comes to creating brand consistency.

9   Organize your sales pipeline

A deal or opportunity object in your CRM is critical.

10   Build a customer-centric CRM

Customers want to be seen.

11   Leverage surveys

Want to begin to understand how your work is paying off?

12   Delight your customers

The thread that binds: After this lesson, you'll be able to recognize the thread of customer delight and how it's integrated throughout each of the CRM tools.

Build CRM Reports

13   Measure what matters

Before building reports, it's important to align on key performance indicators.

14   Map important properties

When data has the right labels, you can move fast and with confidence.

15   Build basic sales reports

Whether you're building a report for yourself, a boss, or your team, building basic sales reports starts here.

16   Perform accurate forecasting

An accurate sales pipeline can help ensure successful forecasting for a business. After this lesson, you'll be able to perform accurate forecasting.

17   Tell your reporting story

A good dashboard adds superpowers to storytelling in analytics.

Conclusion

18 Next steps
Thank you for watching this course!

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