



one day **AGENDA**

Welcome & Introductions

Reviewing Goals with CRM

- Inbound Selling Methodology
- Inbound Lead Generation

Funnel Definitions

- Defining Lifecycle Stages
- Lead Hand-Off Definition
- Viewing Contacts & Companies in CRM

Communicating with Contacts: Emails, Calls Tasks

Lunch

Working a Lead

- Prospecting using CRM
- Associating Contacts, Companies, Deals and Attachments
- [Workshop](#): Receiving a Lead

Deals

- Work a deal through stages
- [Workshop](#): Closing a Deal

Reporting

- Reading the multiple dashboards Lists, Reports, and Views for reporting
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Wrap Up