Sales Rep

ONBOARDING TASK LIST

We know what you're thinking...you don't want to use a CRM! We get it. Now that it's out in the open, we want to make this process as painless as possible, which is why we've created this **checklist** to help you **get started quickly.**

1. To make onboarding run smoothly, you'll want to start with the items you use the most, which are your email, calendar, task notifications, and phone calls (click-to-call).

- [ ] **Set up and sync your email and calendar** LEARN MORE →
  Sync your CRM and email accounts so you can view your contacts and appointments in either location.

- [ ] **Set up notifications** LEARN MORE →
  Decide how and when you'll be notified about important updates to your leads.

- [ ] **Make a phone call with click-to-call** PRO LEARN MORE →
  Click-to-call allows you to place phone calls to your contacts from CRM and then attach the audio recording to the associated company or person page.

2. Now that your basics are set up, you'll want to understand how to create and use your leads.

- [ ] **Create companies, people, and leads** LEARN MORE →
  Add the organizations, individuals, and business deals that you'll be working with in CRM.
  Watch video: Creating and using leads

3. Next you'll want to get acquainted with your **dashboard**. You can access your dashboard from the left-side navigation bar. You can also create cards to manage the information that's most important to you by clicking on the white square that says **Add a card.**

- [ ] **Customize your dashboard**
  Set up cards, manage your activities and to dos, and view your company's timeline.
  Watch video: How to use the dashboard

- [ ] **Create Activities and view your To Do list** LEARN MORE →
  Activities represent your customer interactions, including phone calls, meetings, and presentations. Right next to the Activities tab is the **To Do** tab. Here is where you can filter and view the sales process steps and tasks assigned to you.

4. To stay in the loop while out of the office, check out our native iPhone and Android mobile apps. You'll have all the CRM functionality you need while on the road, including creating leads, people, and companies, viewing reports, and using click-to-call with your cellular data.

- [ ] **Download our mobile apps** GOOGLE PLAY → APPLE ITUNES →

Want to save time? Contact our sales team to learn if one of our onboarding packages is right for you!

Sales Manager

ONBOARDING TASK LIST

As a sales manager, it's your job to ensure that each member of your team is properly set up for success. Completing the tasks below will **create the foundation** for how your team works in CRM, allowing your reps to **stay organized and sell effectively.**

1. CRM's sales process is where you can standardize your company's best sales practices, giving your team a clear and efficient road-map to follow. Setting up your sales process is the single most important thing you can do for your team, so that's where we'll begin.

   - [ ] **Create your sales process** LEARN MORE →
     Your sales process establishes the stages and steps needed to convert prospects into customers.
     Need help visualizing your sales process? Download our Sales Process Worksheet.

2. Next, set up your users and import data from your Excel spreadsheets or from another CRM.

   - [ ] **Add users** LEARN MORE →
     Invite all your sales reps.
   - [ ] **Import People and Companies data from spreadsheets** LEARN MORE →
     Our import tool makes it easy to get your existing contact list into CRM.

3. Now it's time to organize your business by adding tags, custom fields, and outcomes.

   - [ ] **Create tags** LEARN MORE →
     Organize and easily filter your contacts and leads.
   - [ ] **Create custom fields** LEARN MORE →
     Custom fields are key to configuring CRM for your business.
   - [ ] **Create outcomes** LEARN MORE →
     Outcomes help you understand the reasons your deals aren't closing, so you can improve your sales activities.
   - [ ] **Assign leads** LEARN MORE →
     Create rules to automatically distribute each lead to the most appropriate member of your sales team.

4. Finally you'll want to create the structure for how your sales reps spend their time and set up specific actions to help guide their day. You can do this by creating activity types and an activity report.

   - [ ] **Create activity types** LEARN MORE →
     Set up the types of events you'll need to schedule and keep track of.
   - [ ] **Create activity report** PRO LEARN MORE →
     View a summary of your team's sales activities and a detailed report on each interaction.
   - [ ] **Create teams** LEARN MORE →
     Organize and track sales divisions within your organization, or customize your reps' user permissions by group.

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