

CUSTOMER RELATIONSHIP MANAGEMENT CURRICULUM

1. CRM OVERVIEW AND ARCHITECTURE

- Introduction and CRM Definition
- CRM Architecture Overview

2. CRM FUNDAMENTALS

- Business Partners
- B.P Type & Roles, Grouping
- B.P Relationships
- Partner Functions
- Consistent B.P Distribution
- Configuring Field Attributes
- Screen Configuration using VCT
- Additional Customization
- Business Partners

3. Organizational Management

- CRM Organizational Model and its advantages
- Elements of the Organizational Model
- Organizational data determination
- Testing Org data
- Organizational Management

4. Product Master

- Product Types & Grouping
- Enhancing the Product Master
- Hierarchies, categories, set types and attributes
- Number assignments
- Basic Settings

5. Opportunity Management

- Overview of lead management
- Opportunity management
- Sales methodology in CRM Online
- Sales Assistant
- Sales life cycle and Phases
- Additional customization

6. Activity Management

- Types of Activities
- Basic Settings
- Monitoring Activities

7. Sales Transactions

- Structure of sales transactions
- Inquiry and quotation
- Creating New Sales Transactions

- Creating Follow-Up Sales Transactions
- Sales order scenario CRM-R/3
- Basic Settings

8. Partner Determination

- Partner determination in business transactions
- Terms and concepts of partner determination
- Customizing for partner processing
- Define New Partner Functions

9. CRM Billing

CRM FUNDAMENTALS – II

10. Lead Management

- Inbound/Outbound lead generation
- Lead qualification
- Advanced Customizations

11. Marketing Planning & Campaign Management

- Marketing Plans, Campaigns and Promotions
- Creating and editing Marketing Projects
- Promotion Planning and Allocation Scenarios
- Content Management
- Authority Checks
- Advanced Customization
- Creating Attributes for Business Partner Segmentation
- Maintaining Data Sources for Segment Builder
- Creating Samples for large target groups
- Segment Builder

12. Personalized Forms

- Explaining the editing options for mail templates
- Creating personalized e-mails
- Creating personalized subject lines
- Creating personalized attachments
- Advanced Customization
- Campaign Execution
- Execute campaigns across multiple interaction channels

13. ASAP