CRM Training for Sales Professionals

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If you are a Sales Professional, the video below will help you get started and teach you how to:

- Add a contact (both manually and through the Dealer System Search tool)
- Add notes to contacts
- Add to-dos (both single and plans)
- Send a reply to texts in the CRM
- Send an email in the CRM
- Target your sales leads through the use of flags and the marketing section of the CRM
- Agenda Assistant
- Email Templates

WHO SHOULD WATCH THIS TRAINING VIDEO - SALES PROFESSIONALS

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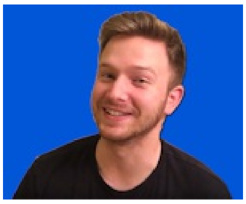
Author



Zack Toler

The sales team needs to move fast and close deals. During the Sales Professionals portion of the HyperDrive Pro CRM training, we're going to show you just how easy it is to keep track of sales leads *and* how to automate every step of the sales process.

No Time For Videos:

USE YOUR DASHBOARD TO STAY ORGANIZED

Dashboards are broken into widgets to help you keep track of important lead information. Widgets are completely customization, and we will start you off with an already formatted layout to keep everything straight.

ADD A CONTACT DIRECTLY FROM YOUR DMS

Add a customer using our "Dealer System Search". You don't even need to know their full name, just a few letters! Once you find the right person, hit the "import" button, and a customer record is created in the CRM.

USE TO DO PLANS TO KEEP IN TOUCH WITH BUYERS

To-do plans make it easy to stay in touch with prospective buyers, and using action sets creates automatic to-do lists for you to follow! All to-dos are visible from a widget on your dashboard, and each step in the sales process will trigger new to-dos, making sure you are in contact with customers through the entire sale.

FLAGS HELP CATEGORIZE CUSTOMERS

Your manager can customize the different flag types in the CRM, but as a sales person, you can use the flags to easily categorize your leads for follow up later. Use flags to designate specific vehicle type a customer was interested in, different groups they are members of, events they attended, and more.

SEND EMAILS AND REPLY TO TEXTS

Use our email templates to send a consistent sales message to all your customers, and reply to text messages all directly from your CRM. Never give out your private phone number or email address!

USE THE SALES BUDDY APP

Sales Buddy is an app you can use on your Android or iPhone and add sales leads directly from your phone! Click on the "Install Sales Buddy" link in the header and follow the directions - you'll be ready to roll in no time.

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