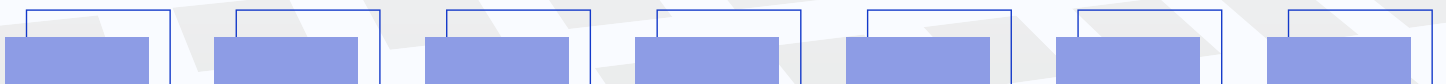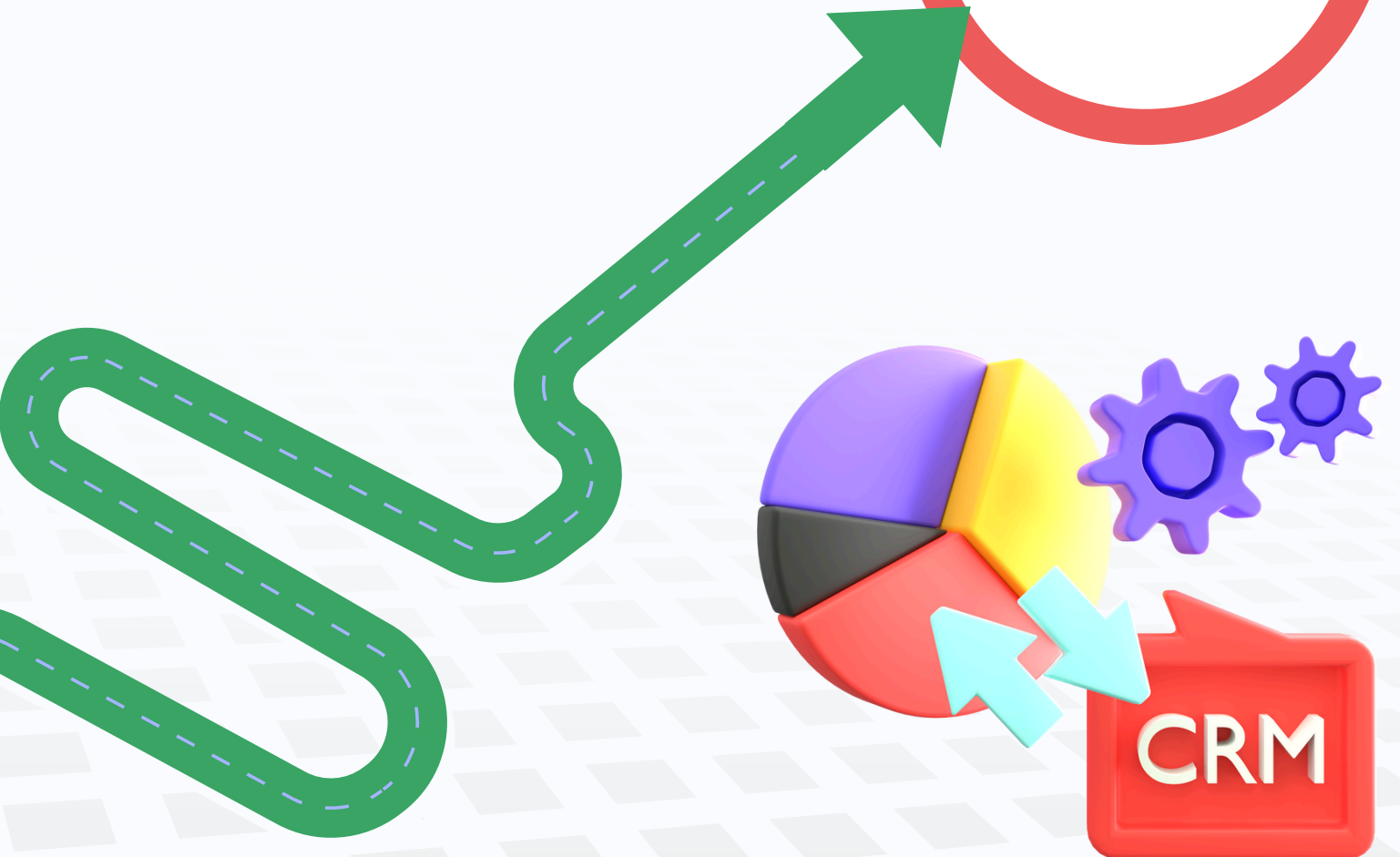# Grovico
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ZOHO CRM COURSE

Live Classes with Placement Support

- End-to-End CRM Training
- Hands-On with Real CRM Scenarios
- Boost Business Communication Skills
- Career-Ready & Certification Focused

Why choose ZOHO CRM?

STREAMLINE SALES & CUSTOMER MANAGEMENT

Zoho CRM helps businesses manage leads, automate sales workflows, track communication, and boost customer retention — all in one platform.

ESSENTIAL TOOL FOR SALES, MARKETING & ADMIN ROLES

Zoho CRM is widely used in startups, corporates, and SMEs to manage customer data, automate follow-ups, and improve team productivity.

USED BY 250,000+ BUSINESSES ACROSS 180 COUNTRIES

From real estate to education to e-commerce — Zoho CRM powers businesses like Amazon India, OYO, and HDFC Sales.

TOP EMPLOYERS VALUE CRM SKILLS

Companies like Zoho Corp, Freshworks, Infosys, TCS, startups, and marketing agencies actively seek CRM-proficient professionals.

ZOHO CRM Course Curriculum

Lesson 1: Introduction to Zoho CRM
- What is CRM and why use it?
- Overview of Zoho CRM features.
- Navigating the Zoho CRM interface
- CRM terminology: Leads, Contacts, Deals, etc.
- Setting up your CRM account

Lesson 2: Organization Settings & Users
- Company information and customization
- Managing users and roles
- Profiles and data sharing rules
- Territory management basics

Lesson 3: Lead Management
- Lead creation and fields
- Lead capture via forms and email
- Lead assignment rules
- Converting leads to contacts/deals/accounts

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Lesson 4: Contact & Account Management
Creating and managing contacts
Account hierarchies and linking
Contact views, filters, and segmentation
Notes, tasks, and follow-ups

Lesson 5: Deal (Opportunity) Management
Creating and tracking deals
Sales pipelines and stages
Forecasting and deal insights
Customizing deal layouts

Lesson 6: Activities & Task Management
Tasks, calls, events, and reminders
Activity tracking and follow-up automation
Calendar sync with Google/Outlook
Recurring tasks and delegation

Lesson 7: Customization -Modules, Fields, Layouts
Custom modules creation
Adding custom fields and sections
Conditional layouts
Module arrangement and Ul settings

Lesson 8: Automation - Workflow Rules
- Creating and managing workflows
- Automatic task assignment
- Email notifications and field updates
- Escalation rules.

Lesson 9: Blueprint (Process Automation)
- Introduction to Blueprint
- Designing a sales process
- Transition rules and conditions
- Real-life Blueprint examples

Lesson 10: Webforms & Lead Capture
- Creating webforms for websites
- Embedding options and styles
- Capturing from social media
- Integration with landing pages

Lesson 11: Email & Communication Integration
- Email configuration (IMAP/POP)
- Email templates and mass emails
- mail insights and open tracking
- Using SalesInbox effectively

Lesson 12: Reports & Dashboards
- Standard reports overview
- Custom report creation
- Dashboards setup
- Scheduling and sharing reports

Lesson 13: Zoho CRM Mobile App
- Navigating the mobile app
- Adding/updating records on mobile
- Location tracking and check-ins
- Offline access features

Lesson 14: Third-Party Integrations
- Zoho ecosystem integrations (Books, Campaigns, Projects)
- Google Workspace & Office 365
- WhatsApp, Telephony, and Chat integrations
- Marketplace overview

## Final Review & Real-World Scenarios
- Complete CRM walkthrough
- Real-time use cases and role plays
- Q&A session
- Tips for admin/consultant-level mastery

Hands-On Project

Lead Management and Scoring App

Prioritize and manage leads effectively.

Streamline your sales process with a lead management app integrated with Zoho CRM, scoring leads based on engagement and buying signals.
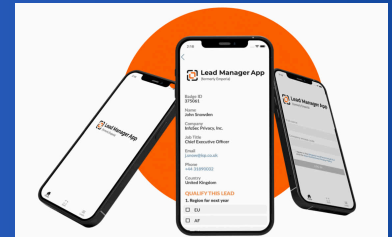
Automated Follow-Up Email Sequencer

Enhance customer engagement with automation.

Create automated email sequences triggered by customer actions within Zoho CRM to improve relationship building.
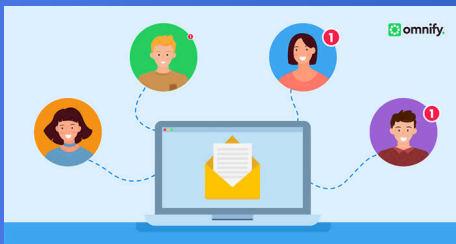
Customer Feedback Collection Tool

Gather actionable customer insights.

Implement an automated survey system post-purchase or interaction to collect and analyze customer feedback within Zoho CRM.

Hands-On Project

Sales Performance Dashboard
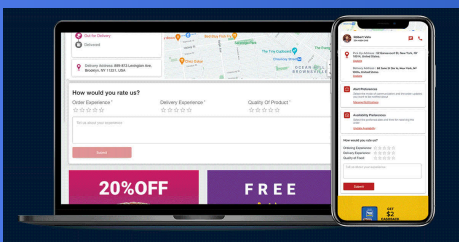
Visualize key sales metrics in real-time.

Develop a dashboard pulling data from Zoho CRM to monitor sales trends, team performance, and conversion rates for informed decision-making.

Deal Tracking and Management App

Manage and monitor deal pipelines efficiently.

Build an app integrated with Zoho CRM to track deals, set follow-up reminders, and generate custom reports to boost sales productivity and revenue.

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CERTIFICATE OF COMPLETION

This is to certify that

DHINESHKAR M

has successfully completed Advanced "XXXXXXX" Certification.

Sunday, April 20, 2025

Rajkumar M
Founder

Joewin R
Co-Founder

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