

MS Office Customized Integration course for Sales Team

Course Overview:

The MS Office Integration for Sales Team training course is meticulously designed to equip Sales professionals with the knowledge and skills required to leverage the integrated capabilities of Microsoft Office applications in their daily tasks. This comprehensive course focuses on optimizing Sales processes and improving collaboration through seamless integration of MS Office tools.

Course Objectives:

- Understand the interconnectedness of Microsoft Office applications and their integration benefits for Sales operations.
- Learn how to streamline Sales processes and workflows using integrated MS Office tools.
- Enhance data management and analysis capabilities by integrating Sales data across MS Office applications.
- Improve communication and collaboration within the Sales team and with other departments through integrated platforms.
- Develop practical skills for creating integrated Sales documents, presentations, and reports using MS Office applications.

Course Modules:

1. How to protect your Data?
2. How to audit and debug your worksheets and document your work?
3. To pick out the important data from a huge list.
4. How to create Portable Documents?
5. Use your own worksheet tables as sources of information to be used elsewhere in formulas.
6. How to manage your information?
7. How to analyzing your data?
8. Keep in touch specific information, such as stock prices, sports scores, or your company's current sales data, from the Internet or an intranet".
9. How to define restrictions on what data can or should be entered in a cell ?
10. Coordinate your efforts by working on the same workbook simultaneously with two or more people.
11. Include data from MS Excel into your notes.
12. How to create a new Outlook Item from within OneNote during your meeting without opening Microsoft Office Outlook?
13. How to send copies of your notes in an e-mail message?
14. How to create Shared notebook for a group project using OneNote?

15. How to Annotate PowerPoint slides?
16. How to make your notes formal documents?
17. How to create a default Outlook view as the initial view presents the information you need right away each morning to start your workday?
18. How to organize your Outlook data items?
19. How to ensure that everyone in your team is using the same categories that you use?
20. How to Include a Carbon Copies and Blind Carbon Copies in your message?
21. What you can do if you want every outgoing message to be copied to a particular person?
22. Organize messages based on sender, recipient, or subject.
23. Copy or move messages from one folder to another.
24. Delete messages automatically.
25. Reply to, forward, or redirect messages to individuals or distribution lists.
26. Respond to messages with a specific reply.
27. Monitor message importance (priority).
28. How you can share your Message Rules with others"?
29. How to control When Messages Are Sent?
30. How to send a single message as an attachment?
31. How to archive a single message?
32. How to customize the Appearance of Your Messages?
33. How to secure your messages signatures from losing?
34. Make email message as a task?
35. What you can do if you tired of wading through so much junk e-mail?
36. How to get an external information provided by content publishers (such as news Web sites) into a folder in Office Outlook?
37. How to create a new contact entry use an existing one?
38. How to save your time by propagating a change for a single contact to multiple contacts?
39. How to create your own contact view"?
40. How to get your phone directory?
41. How to share contacts with others?
42. How to manage your time?
43. How to create your own Calendar view?
44. What you can do if you need to view and compare multiple schedules to identify related items, such as workflow dependencies within a project, as well as to find and alleviate scheduling conflicts"?
45. How to manage your calendar with Two Time Zones?
46. How to Schedule your meetings and resources?
47. How to change the notes stucked to your monitor to electronic notes to keep track of all the small bits of information you receive every day?

48. What you can do if you want your assistant to manage your schedule, setting up appointments, meetings, and other events for you. Or perhaps you want your assistant to send e-mail messages on your behalf?
49. "How to share your calendar information with others?"
50. How to create Electronic business card?
51. "How to get presentation text from outline document ?"
52. How to get Data from Excel to Presentation"?"
53. "How to Create Sales call agenda using PowerPoint?"
54. How to create Business plan presentation using PowerPoint Based on information from Excel?
55. How to create Sales proposal presentation using PowerPoint Based on information from Excel?
56. How to create Milestone summary report using PowerPoint based on information from database?
57. How to create Newsletter and send it for each of your customers using data from Excel or Outlook contacts?
58. How to create Award Certificate for every attendee using Publisher?
59. How to create Employee of the Month Award using Publisher based on data from MS Excel?
60. How to create Envelopes using Publisher based on information from database"?"
61. How to create Customer buying process?
62. How to create Direct marketing process flow?
63. How to create Sales pipeline using information from Excel?
64. How to send the message as a document for review?
65. "How to send mail personally for each of your customers using the Outlook contacts?"
66. How to create and print letter and envelop for each of your customers using data from Excel or Outlook contacts?
67. How to Create a report using MS Word with data from excel?
68. How to create Pool of BUISNESS CARDS using MS Word based on Information from Excel"?"
69. "How to create the below forms using MS Word?
Purchase order, Services invoice with hours and rate, Sales invoice with hours and rate, Conference agenda with tracks.

Course Delivery Method:

- Interactive instructor-led training sessions delivered by experienced facilitators with expertise in MS Office integration for Sales.
- Hands-on exercises and practical demonstrations tailored to Sales-specific integration scenarios to reinforce learning.

- Collaborative group activities and case studies focused on real-world Sales use cases to encourage practical application of integrated MS Office concepts.
- The course includes selected features from the below applications:
 - Word
 - Visio
 - Publisher
 - PowerPoint
 - Outlook
 - OneNote
 - Excel

Course Duration:

40 Hours duration.

The duration of each module and the overall training course can be customized based on the depth of integration covered and the specific learning objectives of the Sales team.

Course Benefits:

- Empowers Sales professionals with advanced skills in leveraging integrated Microsoft Office applications to optimize Sales processes and workflows.
- Provides practical knowledge and hands-on experience in implementing integration solutions tailored to Sales-specific requirements.
- Enhances collaboration and communication within the Sales team and with other departments by leveraging integrated platforms such as Outlook.
- Equips Sales professionals with valuable skills that contribute to improved data accuracy and increased productivity.