

SAP Sales Cloud Version 2

OEM: SAP • Code: C4H470



COURSE DESCRIPTION

Join us for an in-depth, instructor-led exploration of SAP Sales Cloud v2, designed for both business users and administrators. This comprehensive course will empower sales representatives and managers with advanced tactics for lead and opportunity management, enhancing your lead-to-cash processes. Dive into the future of sales with Machine Learning and Gen AI, leveraging Lead Intelligence for smarter decision-making. Experience hands-on training with innovative tools like the Guided Selling App, Pipeline Manager, and Forecast Tracker. Discover how to optimize sales performance, improve forecast accuracy, and drive business growth with SAP Sales Cloud v2. Elevate your skills and stay ahead in the ever-evolving sales landscape. Register now to secure your spot!

AUDIENCE PROFILE

- Business User
- Application Consultant
- Super/Key Power User
- System Administrator

PREREQUISITES

Essential

- CRM/Sales domain knowledge

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- Understand Key Features of SAP Sales Cloud V2: Identify and explain the key capabilities and benefits of SAP Sales Cloud Version 2.
- Navigate the System Interface: Demonstrate efficient navigation and customization of the SAP Sales Cloud V2 interface.
- Manage Leads Effectively: Perform lead management tasks, utilize playbooks, and apply lead scoring to prioritize sales activities.
- Handle Opportunities Proficiently: Use guided selling playbooks to manage opportunity progression, update statuses, and monitor progress.
- Master Sales Quotation Management: Apply best practices for creating, managing, and tracking sales quotations.

- **Process Sales Orders Accurately:** Create and manage sales orders, ensuring alignment with product, pricing, and customer agreements.
- **Organize Sales Tasks Efficiently:** Utilize task management features and the Digital Selling Workspace to organize and prioritize sales actions.
- **Plan and Document Customer Visits:** Effectively manage customer visits within SAP Sales Cloud, including planning and documentation.
- **Monitor Sales Performance:** Leverage managerial tools for performance monitoring, pipeline optimization, forecasting, and team enablement.
- **Configure and Evaluate Playbooks and KPIs:** Configure playbooks from a management perspective to guide sales teams and assess performance via KPIs.
- **Analyze Pipeline Performance and Trends:** Use pipeline and trend analytics to support process optimization and identify sales trends.
- **Administer the System Effectively:** Perform core and advanced administrative activities, including user setup, basic configurations, and data management.
- **Configure Core Sales Components:** Tailor lead, opportunity, quote, order, and visit management modules to reflect business-specific sales processes.
- **Integrate Communication and Collaboration Tools:** Configure and use collaboration tools, such as MS Teams integration, to streamline sales execution and team coordination.
- **Leverage AI for Sales Optimization:** Understand and configure AI-based capabilities to automate and optimize decision-making in sales operations.

COURSE OUTLINE

Module 1: Introduction to SAP Sales Cloud Version 2

- Getting an Overview of SAP Sales Cloud Version 2
- Navigating Essentials in SAP Sales Cloud Version 2
- Navigating SAP Sales Cloud

Module 2: Lead-to-Cash Process – Sales Execution

- Understanding the Daily Tasks of Sales Representatives
- Mastering Playbooks: Introduction, Setup, and Guided Selling
- Progressing a Lead with Playbooks
- Progressing an Opportunity with Playbooks
- Managing and Creating Sales Quotes
- Utilizing and Creating Sales Orders
- Task Management and the Digital Selling Workspace
- Exploring the Digital Selling Workspace
- Creating a Call List
- Understanding Visit Management

Module 3: Sales Management and Operational Insights

- Understanding the Daily Tasks of Sales Managers
- Optimizing Playbooks and Evaluating KPIs
- Streamlining Pipeline and Process Flow with Trends Analytics
- Exploring the Pipeline Manager

Module 4: Functional Administration for System Optimization

- Core Responsibilities and Tools for Administrators
- Creating a New Role
- Creating a New Employee
- Creating a New Business User
- Creating an Account
- Creating a Contact
- Advanced Configurations and Automation

Module 5: Configuration of Core Sales Components

- Lead Management Configuration
- Creating a New Lead Routing Rule to Employees
- Creating a New Source for Leads
- Opportunity Management Configuration
- Creating a New Document Type for Opportunities
- Creating a New Category for Opportunities
- Configuring Pipeline and Sales Forecasting
- Quote Management Configuration
- Configuring Pricing Strategies
- Sales Order Configuration
- Visits Configuration
- Configuring Call Lists and Outreach Planning
- Creating a New Call List Category
- Configuring Sales Activities

Module 6: Communication & Collaboration Tools

- MS Teams Integration – Enhancing Collaboration
- Streamlining Communication Channels
- Understanding Relationship Intelligence

Module 7: AI & ML-Driven Sales Optimization

- Leveraging Machine Learning for Intelligent Sales and Lead Scoring
- Configuring Gen AI and the CX AI Toolkit

Module 8: Mobile App Configuration and Security

- Working with the Mobile App
- Setting Up Mobile App Features
- Managing Mobile App Integrations and Security