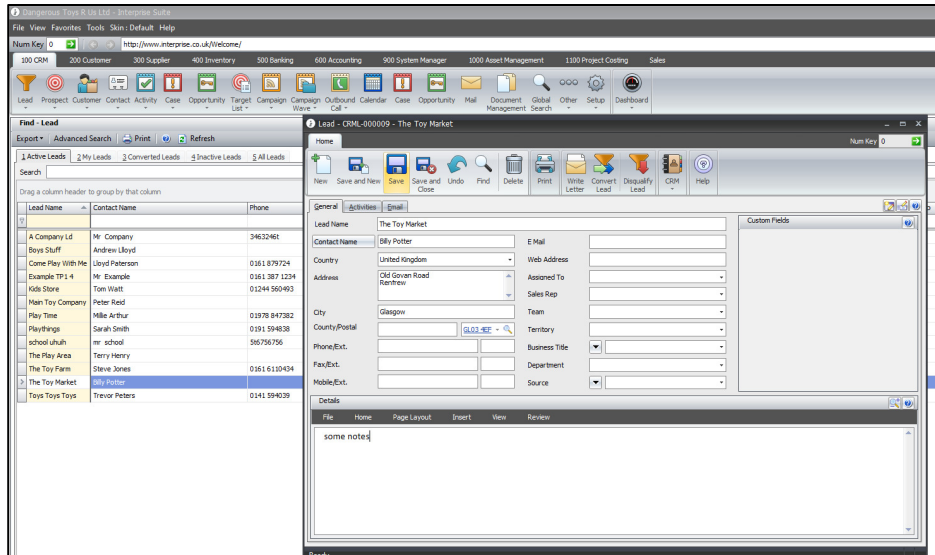


CRM Ways to Work

Leads

If a potential lead comes in from the website or a call in you could create a lead record. So it can be followed up and converted to a prospect (and opportunity) if valid.

You may also want to import a database of potential leads. Maybe you bought some data in to cold call. You could create a target list and call them and then convert them to a prospect if valid. Leads can have custom fields.

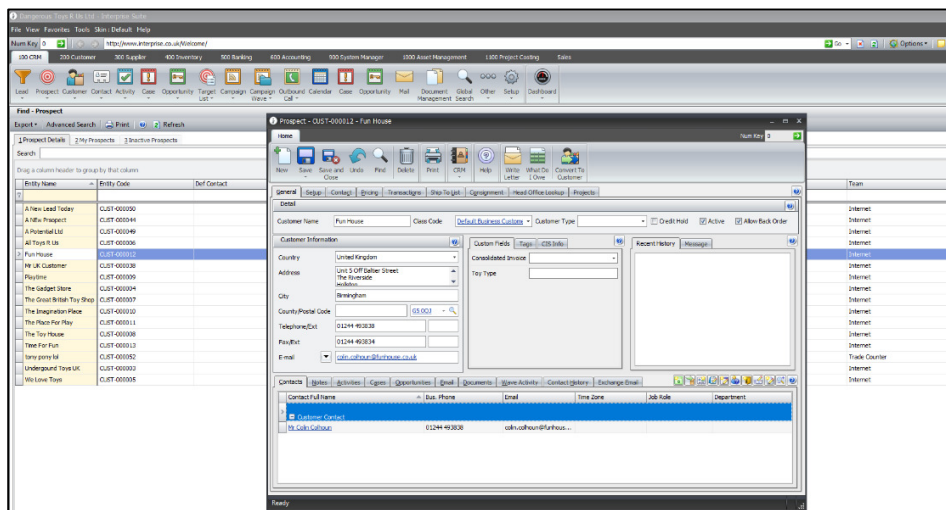


Prospects

A prospect should be someone you have talked to and they are valid as a potential customer at some point. Or you have profiled them.

Prospects can be converted to a customer record. You can do quotes for a prospect based on their pricing, price lists etc. These quotes can be emailed with or without item attachments.

You can create an opportunity record attached to a prospect with activities such as calls, call backs, meetings, to dos, attach documents and make notes. These can also be attached to the prospect record. Prospects can have custom fields.





CRM Ways to Work

CRM should speed sales up not slow you down with admin. There is a trade-off between knowing what sales are doing but this will be dependent on the size of your sales team. Bigger the team more admin/control is required.

Scenario 1 – Use Opportunities

In the prospect record you can create Opportunity records. Opportunities have their own dashboard, stages, due date, activities, documents, quotes assigned to them, Rep, Assigned to etc.

If your deals are more long winded then Opportunities may be the best idea.

Scenario 2 – Use Quotes

It maybe that you view outstanding quotes as your prospect / opportunity list. The normal quote find list has customer, value, date, rep, assigned to etc.

In the Quote form we could also add a custom field for Opportunity Stage or Quote Stage pull down. This can then also be added to the find quote list and used to group or sort.

Quotes can be voided if the prospect or customer is not going ahead now. Note with quotes you can email spec sheets of the item lines on the quote.

Scenario 3 – Use Find Lead, Prospect Lists

We could add the Opportunity stage field to the Lead and Prospect forms and find lists. This is a really quick way to group and sort records without having to create opportunities if you wanted to work this way.

Scenario 4 – Do Mixture of above

It is about what works for you.

For example, We use Leads when we import data. We create a target list and call campaign for the leads. We call them and if we get through we either void the lead or convert to a prospect. We update custom fields in the prospect form for number of users and existing software. We also use a custom field for the Opportunity Stage to tell us the stage of the prospect without having to create an opportunity.

We create Opportunities for Hot Prospects and Longer Term Prospects only. We attach word quotes and other documents to the customer record.