Sales Rep Guide for Lead-Xpress

Depending upon the way your LeadMaster administrator has configured Lead-Xpress, you will receive an email with a request to update your accounts / records / leads with either

- A web form embedded within the email or
- A link to a web form

Either of these methods will allow you to update your account / record / lead in the LeadMaster Lead Management CRM System.

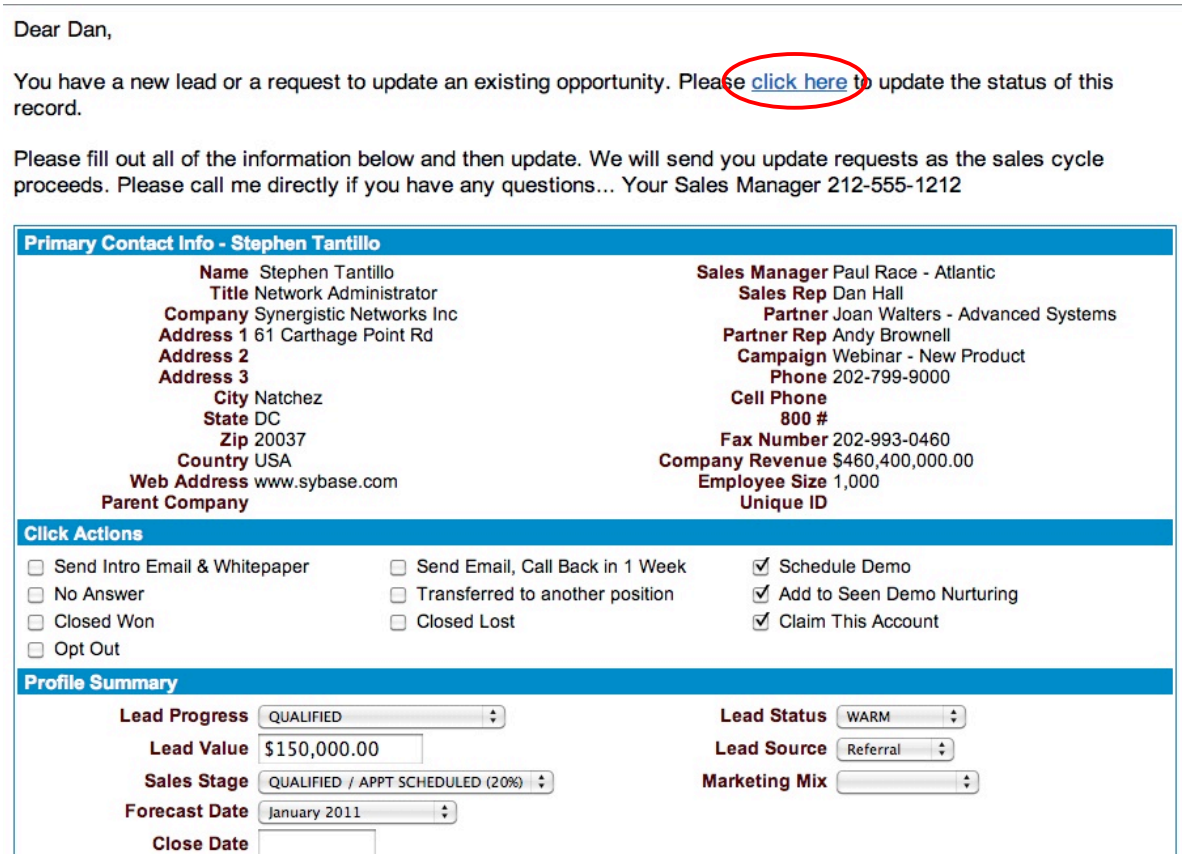
The web form is customizable and can be as long or as short as needed to capture the desired information from the sales team.

This document provides a short explanation of both.

Contents

Working with the Request to Update Records Email

Here's an example of the Request to Update Records email:



Dear Dan,

You have a new lead or a request to update an existing opportunity. Please click here to update the status of this record.

Please fill out all of the information below and then update. We will send you update requests as the sales cycle proceeds. Please call me directly if you have any questions... Your Sales Manager 212-555-1212

Primary Contact Info - Stephen Tantillo

Name	Stephen Tantillo	**Sales Manager**	Paul Race - Atlantic
Title	Network Administrator	**Sales Rep**	Dan Hall
Company	Synergistic Networks Inc	**Partner**	Joan Walters - Advanced Systems
Address 1	61 Carthage Point Rd	**Partner Rep**	Andy Brownell
Address 2		**Campaign**	Webinar - New Product
Address 3		**Phone**	202-799-9000
City	Natchez	**Cell Phone**	
State	DC	**800 #**	
Zip	20037	**Fax Number**	202-993-0460
Country	USA	**Company Revenue**	$460,400,000.00
Web Address	www.sybase.com	**Employee Size**	1,000
Parent Company		**Unique ID**	

Click Actions

- ☐ Send Intro Email & Whitepaper
- ☐ Send Email, Call Back in 1 Week
- ☑ Schedule Demo
- ☐ No Answer
- ☐ Transferred to another position
- ☑ Add to Seen Demo Nurturing
- ☐ Closed Won
- ☐ Closed Lost
- ☑ Claim This Account
- ☐ Opt Out

Profile Summary

Lead Progress	QUALIFIED	**Lead Status**	WARM
Lead Value	$150,000.00	**Lead Source**	Referral
Sales Stage	QUALIFIED / APPT SCHEDULED (20%)	**Marketing Mix**	
Forecast Date	January 2011		
Close Date			

The embedded form is compatible with most email clients.

- For many email clients, such as Gmail, Yahoo, etc., you can update the record directly from within the email. Just fill in the appropriate fields and click **Submit**.

- If your email client does not properly display the embedded form, *click on the link* (circled in red) to update the record.

- Please note – once you have updated the record, the email may no longer accurately reflect the data in the LeadMaster system. For example, if you update the lead status from "Warm" to "Hot", your email will still show "Warm". You should click on the link to see the current data for the record after the initial update.

Completing the Web Form:

This form is customizable. You can decide not only which sections you want to include or exclude, but you can also customize many of the individual items inside the sections.

- **Contact Info** – Provides basic company and contact info.

- **Click Action Check Boxes** – By checking the box that corresponds with your update, the system will log, date and time stamp the information. This is the fastest and easiest way to update your records. All of these checkboxes are user-definable.

    - Please note that checking some boxes will result in corresponding actions that are programmed through LeadMaster's Automation and Workflow Management feature.

        - Send Intro Email and Whitepaper
        - Add to Lead Nurturing, etc.

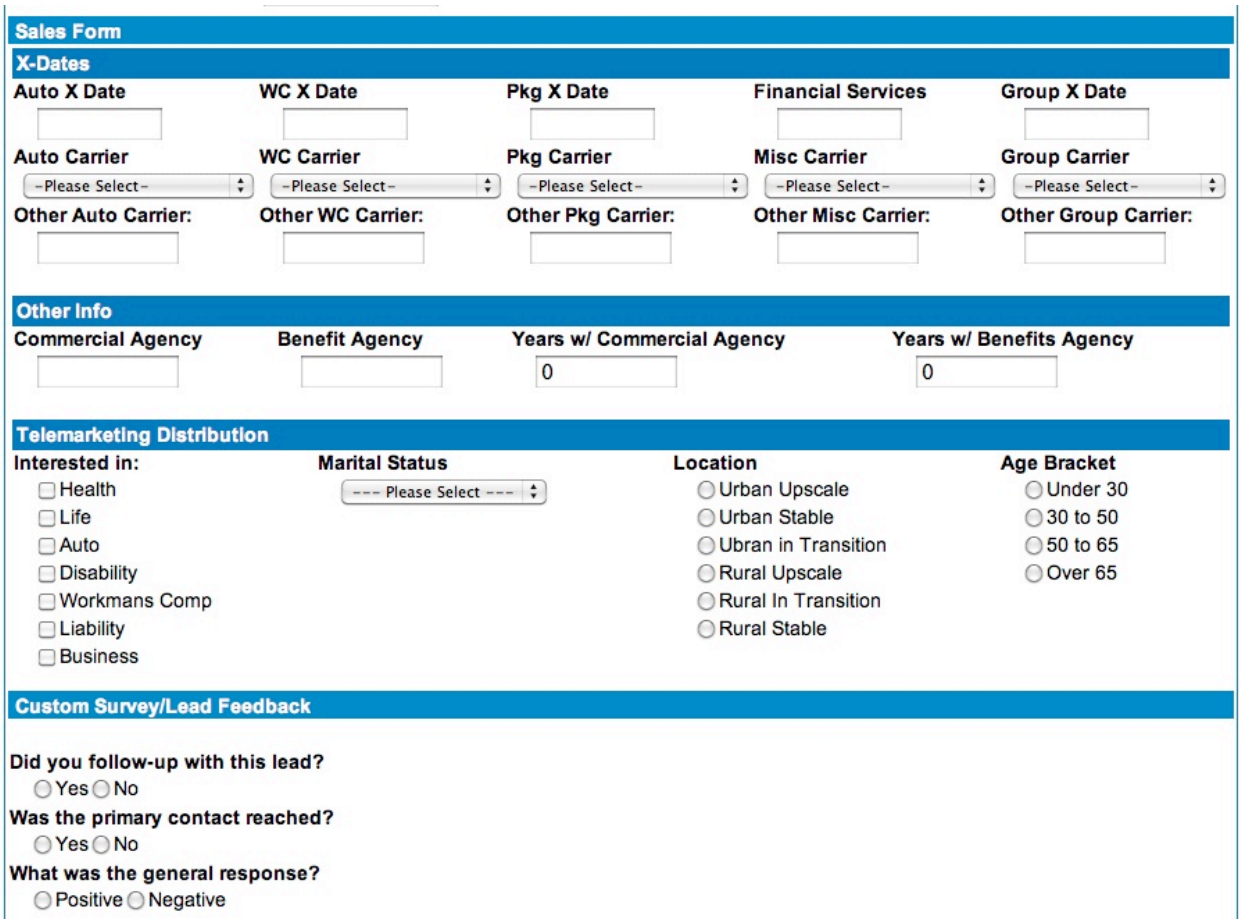
- **Profile Summary** – These are user-definable fields. As shown here they help track both the status of the lead and once an opportunity is identified, the sales stage.

  Because most of these fields include a list of choices, they provide a consistent way of tracking and measuring performance.

  These fields are tied into reporting and charting so that progress is easily tracked on the LeadMaster dashboards.

  When you've completed a sales call simply update the account using one or more of these fields.

- **Custom Forms** - In addition to the standard LeadMaster sections (Contact Info, Click Actions, Profile Summary etc.), the LeadMaster administrator can also include fields and forms of your own design.

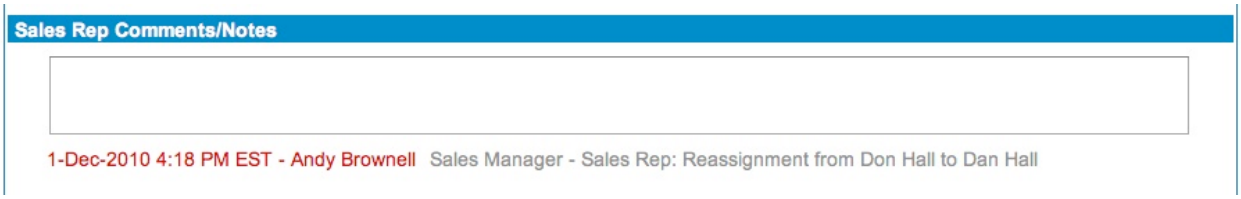


Above are 4 examples of sections that can be designed by the LeadMaster administrator. These examples are related to the insurance industry.

- The first section contains expiration dates.
- The second section contains data about agencies.
- The third section contains customer survey data that may have come from a telemarketing program.
- The fourth section contains a survey for the sales rep on the quality of the lead.

All of these sections are designed to illustrate how an insurance company might use Lead-Xpress. This form could have just as easily been designed for any industry.

- **Sales Rep Comment/Notes** – This section provides a place to record interactions with the customer.



All of the previous comments can be displayed in both the email and the web form.