MASTERING THE SALES PROCESS & PIPELINE

How to Sell Better & Faster using LeadSquared

Speaker
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WHAT IS SALES?

“A sales process is a systematic approach involving a series of steps that enables a sales force to close more deals.”
COMMON QUESTIONS THAT PLAGUE SALES MANAGERS

- How do I track my team efforts & performance?
- How do I track all the activities done by my team?
- How do I know which team member requires what kind of help?
- How do I track region-wise/product-wise revenue?
COMMON QUESTIONS THAT PLAGUE SALES USERS

• What kind of data should I be viewing every day?
• How do I prioritize whom to call/follow up with?
• How do I check my own efforts and derive results out of it?
• How do I know which deals are most likely to close?
SIMPLIFYING THIS PROCESS THROUGH LEADSTORED

Lead Capture Automation
Seamless lead capture from all your sources - PPC ads, social media, website, phone & more

Lead Distribution
Distribute your leads based on geography, interest or any other criteria

Lead Qualification
Focus your sales efforts on leads that meet your quality criteria

Sales Prioritization
Find leads that need immediate attention

Sales Metrics
Monitor every aspect of your sales - funnel, people & revenue

Sales Automation
Automate tasks like lead & task assignment, list creation, sales notifications & more

Field Sales & Inside Sales
Simple mobile CRM to run your entire field sales operations

Lead Lifecycle Management
Map your entire lead management process from capture till conversion
LEAD QUALIFICATION

- Customize the lead qualification criteria completely to meet your business needs
- Use email and phone number validators
- Assign high scores to leads that fit your ideal customer persona.
- Setup sales signals
LEAD DISTRIBUTION

LeadSquared provides Automated Lead Assignment feature with Lead Distribution App.

SET UP LEAD DISTRIBUTION RULES

- Assign Lead to Team A If Interested in Product A
- Assign Lead to Team B If Interested in Product B
- Assign Lead to Team C If Interested in Product C

- You can distribute your leads based on any of the lead attributes such as geography, product interest or any other criteria.

- You can create multiple distribution rules with AND/OR conditions and pattern match of text values. Example: Pin code starting with 560 is assigned to one team and PIN starting with 570 is assigned to another team.

- Do round-robin assignment within your sales group.
FEATURE RICH & HASSLE-FREE LEAD LIFECYCLE MANAGEMENT SYSTEM

- Smart Views for Users
- Permission Templates for View Control
- Calendar View for Task Management
- Activity Grid View for Managers
- User Activity Reports for Tracking
MOBILE CRM

LeadSquared Mobile CRM is an end to end Field Sales Operations Application. One can execute entire field sales process using the same and get real time data and reports.

Dashboard gives complete details of new leads assigned to sales reps, tasks that need to be performed for that day and his/her backlog of leads and tasks.

Dashboard also provides performance metrics so that your sales reps know if they have been meeting their targets.

- **Standard Features:** Mobile App provides standard Lead Management features such as
  - Add new leads
  - Modify leads
  - Change lead stages
  - Add activity to leads
  - Add meeting details and notes
  - Assign leads

Below are the salient features of the Mobile App

- **Dashboard:** Mobile app has dynamic dashboard which gives the sales executive complete planner for the day / week / month.
• **Geo Tracking**: LeadSquared Mobile App comes with Geo Tracking capabilities. Locations of your sales reps are tracked, when on the field
  
  o Check IN & Check OUT functionality to determine start time and end time of your field rep if they are not in office.
  
  o Meeting activities: Location is tracked when meeting is created in the App.
  
  o Travel tracker: Travel path of your sales rep is calculated along with the distance covered
SALES AUTOMATION

With LeadSquared Automation features, you can manage your sales execution in a very efficient manner.

- Create alerts for sales users based on leads activities.

Other automation features available are:

- Automated lead assignment
- Lead prioritization
- Automated workflows to eliminate repetitive tasks of sales users

LeadSquared Rules Engine can be configured to achieve below functions:

- Automated sales funnel movement - change the lead stages based on property update or activity completion.
- Automated sales task/ activity creation with reminders.
SALES ANALYTICS

LeadSquared provides standard reports pertaining to all the features listed, which includes:

- User Activity
- Productivity reports
- Reports around call center
- Lead Funnels & Lead Insights
- Lead Stage Analysis
- Tasks Analysis
- Sales and Revenue Reports
- Field Sales Analysis

LeadSquared comes with hundred plus standard reports. If the customer requires additional reports, the same is provided as Custom Reports.
SALES METRICS

SALES FUNNEL
- COLD: 569 leads
- WARM: 322 leads
- HOT: 167 leads

SALES PERFORMANCE REPORT
- Leena G:
  - Meetings: 42
  - Tasks: 19
  - Revenue: $21k
- David Hetfield:
  - Meetings: 22
  - Tasks: 8
  - Revenue: $11k
- Shibani Roy:
  - Meetings: 16
  - Tasks: 8
  - Revenue: $33k

Revenue by month
- January: $76k
- February: $44k
- March: $123k
- April: $22k
- May: $45k
Any questions?
Thank you! Let’s get in touch:
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