

# Managing Sales Process Using LeadSquared

A Webinar by  
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# Key Takeaways

- 1) Focusing on the Right Leads
- 2) Quick & Easy Way to Manage Leads
- 3) Showing Relevant Data to the Sales Rep
- 4) Automating the Sales Process
- 5) Monitoring the Performance

# Focusing on Right Leads

- Quality Score
  - Based on Lead Attributes -- City / Product / Age etc
    - Example 1 ( B2C ): Insurance - Based on Type of Insurance / Value of Premium / Location
    - Example 2 : (B2B ): Source of Lead /Number of Employees / Location / Turnover Etc
- Lead Score
  - Based on Online Lead Activity - Website Visits / Form Submissions/ Email Open etc
  - Based on Offline Lead Activity -Custom Activities like Phone call /Meeting / Demo
- Engagement Score
  - Score based on Time / Stage / Activities

# Help your team identify the best sales opportunities

QUALITY SCORE > 8



**GRADE (A) LEADS**

5 < QUALITY SCORE < 8



**GRADE (B) LEADS**

QUALITY SCORE < 5



**GRADE (C) LEADS**



**Call immediately**



**Call when lead score exceeds 100**



**Don't call. Nurture with marketing campaigns**

# Managing Focused/Qualified Leads

- Using Smart Views to Manage - Focused Leads
  - Smart Views for - Leads
  - Smart Views for - Tasks
  - Smart Views for - Activities

# Automating the Sales Process

- Automated Sales Funnel
  - ❖ Workflow Automation
    - ❖ Task Automation -
      - ❖ Create Task on Lead Creation
      - ❖ Create Follow up Task on update of a Lead
  - ❖ Notifications ( Email / SMS )

# Automating the Sales Process

- ❖ Workflow Automation
  - ❖ Automate Lead Stage Change
    - ❖ Stage Change Based on Activity
    - ❖ Stage Change Based on Score
  - ❖ Notifications
    - ❖ Notify by Email or SMS
    - ❖ Notify on the App of Leadsquared

# Show Relevant Data

- Control What Sales People View
  - Use Permission Templates
- Guide them with Pitch / FAQs / Communication
  - Custom Tabs - Predefined Content /Pitch
  - Automated Emails - Based on Activity



# Analytics / Dashboards

- Custom Dashlets
  - Dashlet builder
  - Bar / Pie Charts
- Custom Dashboards
  - Add New Dashlets / Customize the Dashboard

# Prospect / Lead Retargeting

- Facebook Retargeting
- Google Retargeting ( In Progress)

THANK YOU