Sales Lead Manager
Customer Management Software

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A quick overview of your new sales and contact management system.

Sales Lead Manager from MBL Solutions allows you to easily manage all of your prospects and clients from one system. You will be able to track the progress of your prospects from cold lists, to warm leads, meetings, proposals, projects and campaigns. You'll be able to easily view and report on companies by your account managers and by status.

The great thing about Sales Lead Manager is that you can create your own fields and field selections to suit the way you work! Using the simple Admin you can create contact fields and prospects statuses (and much more) to reflect the way your own sales processes work.

Getting Started

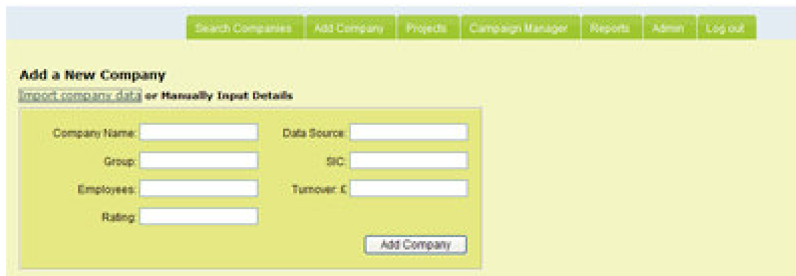
Before you start

To get working with Sales Lead Manager you may need to import existing data and create the fields that you want to use to capture data about your prospects. Go to the Admin section to set up your users.

> Tip – check that you are happy with your field options before you enter live data (although you can change the field title later, this will affect all of the data captured under that field).

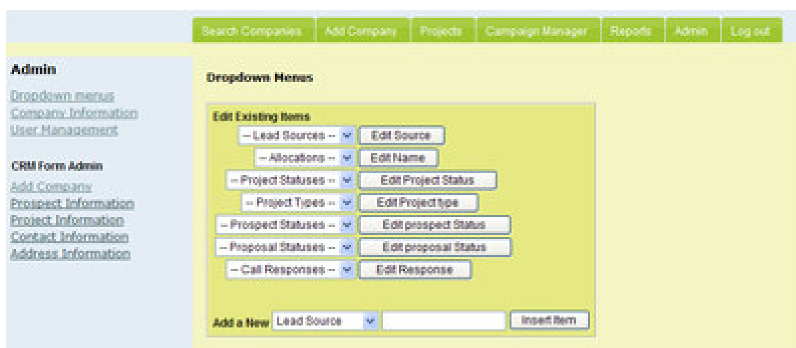
Adding your data.

Select "Add a Company". From here you can choose to enter data manually or select "Import Company Data" to import company and contact data. Follow the instructions given and match your fields to those in Sales Lead Manager.



Create your custom drop down selections.

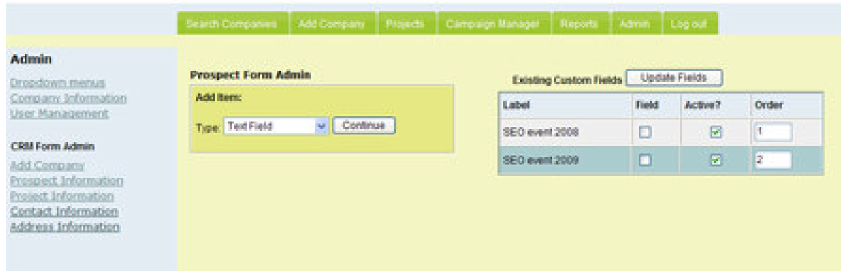
Go to Admin and here you will be able to add new drop downs and edit existing ones. You can use the fields as you wish. The standard ones are:-



- Lead Source: Where did the lead come from (advert / web)?
- Allocations: Who has it been allocated to?
- Project status: Quote, Specification, Design etc..
- Project Types: Relating to your products or services
- Prospect Status: Meeting Stage, Proposal Warm, Proposal Cold, Client etc..
- Proposal / Project Status: Cold, Warm, Hot, Successful etc..
- Call Responses: Interested, Not Interested, Future Interest etc (can be linked to action reminders)

Add new fields to a screen to capture additional information

You may want to track additional information about a client or prospect, perhaps that they have attended an event or received a flier. You may even want to create a research questionnaire as part of a telemarketing campaign.



Choose the screen you want the field to appear on (from the LHS). Select the type of field you require (text, drop down, checkbox etc), enter it's title and the number of options and option labels (if relevant) and select Save Custom Field. You cannot delete custom fields but you can select that they should not appear on your screens (Active). You can change the order that they appear on your page by entering the order number on the RHS.

Using the system

The basic principle:

- Your database contacts are assumed to start out as “cold” contacts.
- You ring these contacts and add contact notes and bit by bit develop them into prospects and lead and hopefully customers.
- At some stage you may want to allocate a sales person or member of staff to the prospect and they will require an appointment creating.
- After the meeting you will hopefully need to develop a quote or proposal which is done by creating a project file. Note that information within this project file can be used to create a confirmation order for your customer.
- You can track the status of this proposal until it becomes a live project and you can report on proposals and projects against its status or the type of project.
- A large project may contain a telemarketing campaign. This campaign may require data which needs to be kept separate from the main database for licensing reasons. You may also want to be able to create separate research questionnaires which you do not want to add to the main database.

The Search:
To search for all records in a search criteria enter %. Otherwise simply enter the key words (or part of word), company name, contact name, post code, SIC description etc..

Create a Company:
The first step is to create a company. It is always good practice to enter a data source (so that you see which data performs best over time) and an SIC description so that you can search on types of company

Create Addresses:
You can create multiple addresses for a company.

Create Contacts:
You can create multiple contacts and allocate a main address to each. You can track contact and marketing activity against individual contacts by creating custom fields on the contact screen (form) in the Admin.

Update your Prospecting information:
When you begin calling a cold contact, use the prospecting information to enter calling information (name of secretary, best time to call), plus the outcome of the decision maker contact (including why they are not interested and when they might be). You can add additional fields on this screen through the Admin. Create the initial sales meeting through the prospecting screen, allocate sales staff, and this will appear as a reminder on the main entry screen.

Create Contact Notes:
Every time you have a phone call, meeting or send a letter you can create a contact note. The most recent will appear on the main company screen. This will ensure everyone using the system will know the latest contact status.

Make an Appointment:
Create the initial sales meeting through the prospecting screen, allocate sales staff, and this will appear as a reminder on the main entry screen. The appointment will be sent to the member of staff selected to attend and will automatically create a diary appointment containing relevant information.

Create a Proposal (Project):
A Proposal is a Project which has not been accepted by the client yet. You need to be able to track the status of proposals until they become live projects and then track live projects through their status. Note this is designed for sales purposes only and this is not a project management system. You can only create a Project if you have first created the company. The system will automatically create a project reference based upon the first 6 letters of the company, the type of project, and a unique project number.

Create an Action:
An action can be created from a Project and a Campaign. Actions will be linked to sales team members and will generate reminders and reports.

Create a Telemarketing Campaign:
The Campaign in Sales Lead Manager is part of Projects (it needs to associate with a project). Currently it is designed to manage specific telemarketing campaigns for improved data management. This might include a research campaign to prospects, using one use only purchased data. You may have questions or feedback required which you do not want to add to the main database to make standard screens confusing. You will have the option at the end of the campaign to import the data (or return the data) back to the main database.

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A quick snapshot of what you get and what you can do with Sales Lead Manager