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Tracking Sales Leads

Sales Discussion

Discussion

We at MW have a defined sales process. (demo request, reply, schedule, deliver, follow up, close)
What is your sales process (ex. Someone walks in)?
What does *sales* look like in the Countertop Fabricator space?—different segments (dealers, builders, big-box, retail, etc)
What kinds of *sales activities* do you do?
Why is it important to track sales activities?
How do you track your sales activities?
What's wrong with forms, folders, paper?

Sales is important to a business. Keeping good track sales activities will only help us make more money

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Enhancing JobTracker with *Sales Lead Tracking*

Business Goals
Execute your existing sales process more effectively
Make more sales by being proactive and not missing follow-ups
Continually improve your sales process by measuring what works
Measure the effectiveness of your salespeople

Software Goals
Create your sales lead process in JobTracker
Create actionable views
Create reports that measure effectiveness

Agenda

- **Sales Leads Process in JobTracker**
- **Calendar/Sales Lead Views**
- **Reporting**
- **Set up Your Own Sales Leads Process**
  - Toolkit
  - Build your own sales process in your test database

Account
Lead
Job
Lead Activities
Job Activities
Lead Files
Lead Forms
Job Files
Job Forms

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Sales Lead Detail

Sales Lead Detail - Sam Smith

Sales Lead Info: Edit Sales Lead Info... | Move to Account... | Convert To Job...

Sales Lead Name: Sam Smith
Account: Sam Smith
Creation Date: 1/13/2017
Salesperson: Eric
Notes: Very concerned about how the material will affect acoustics

Account Contacts: Select Contacts...

Contact Name	Contact Info
Bliss Banewell	Sam's agent - call Bliss, instead of Sam between Feb 1-14 while Sam's on tour.

Sales Lead Address: Create Sales Lead Address...

(Same as account address.)

Account Address: Edit Address...

Samuel Smith
745 Singer Sound
Dothan, AL 35806
256-555-9856
256-555-7458 cell
[Show map]

Sales Lead Activities: New Sales Lead Activity... | New Sales Lead Phase...

Activity	Status	Start Date ↑	Sched Time	Duration	Assigned To	Material	Notes
Outbound Call	Complete	2/10/2017	9:35am	5 minutes	Eric		called for Sam, no answer. Try again next week in the afternoon.
Outbound Call	Complete	2/15/2017	2:15pm	5 minutes	Eric		Interested, but was busy. He asked for a call back tomorrow mid-afternoon
Phone Call / Email Follow Up	Estimate	2/20/2017	4:00pm	5 minutes	Nora		

Sales Lead Info Form

Edit Sales Lead Info

Form Template: Sales Lead Info
Form Name:

Contact Preferences

Preferred Communication: Phone
Best Time to Connect: after 3pm

How did we become aware of this Sales Lead?: Cold Call
Expecting to Make Decision By:
Have we had a conversation with this Sales Lead?: Yes

Opt-out Date:
Opt-out Reason:

Sales Info

Type of Job: Residential - New Build
Material Type: sound-absorbent material?
Square Feet: 50
Purchase Driver: Bargain-hunter

OK Cancel

Sales Lead Info

Sales Lead Notes:
Very concerned about how the material will affect acoustics

Contact Preferences

Preferred Communication:	Best Time to Connect:
Phone	after 3pm

How did we become aware of this Sales Lead?:	Expecting to Make Decision By:	Have we had a conversation with this Sales Lead?:
Cold Call		Yes

Opt-out Date:	Opt-out Reason:

Sales Info

Type of Job:	Material Type:	Square Feet:	Purchase Driver:
Residential - New Build	sound-absorbent material?	50	Bargain-hunter

Sales Lead – CounterGo Quotes & Attachments

CG-Quotes: New CG-Quote... Add Existing CG-Quote...

Quote Name	Status	Price List	Salesperson	Created Date	Revision	Revision Date	Action Status	Quote Number
Cornelius Bennett	Active	Retail	Jason	2/10/2017	1	2/10/2017		450

Files: Attach File...

File Name ↑	Description	File Type	Size	Date	Quote Name
IMG_3796.png	Drawing of the main entry way	Customer drawing	1862 KB	2/14/2017 2:11:15 PM	

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Calendar View - Manager Overview

Friday, February 10, 2017 | Previous 10 days | Next 10 days | Go to Today

Date	(Unassigned)	Nora	Eric	Jason
	(5 minutes)	(5 minutes)	(30 minutes)	(25 minutes)
Friday 2/10/2017	Jeremiah Smith Outbound Cold Call 10:00am - 10:05am Unassigned 205 West 4th St. 503-555-6547	Sam Smith Phone Call / Email Follow Up 4:00pm - 4:05pm Nora 745 Singer Sound 256-555-9856 256-555-7458	Jacob Gurasco Phone Call / Email Follow Up 8:00am - 8:15am Eric	Jerrie Underwood Phone Call / Email Follow Up 10:30am - 10:35am Jason 7756 Southern Way 339-939-4756 Jerrie@test.xyz
			Beau Jones Phone Call / Email Follow Up 10:00am - 10:15am Eric 12312 Catalpa Ct. 321-456-7890 abc@xyz.xyz	Chad & Larry Rodman Phone Call / Email Follow Up 11:30am - 11:40am Jason 4838 Divey Dr 555-555-5512 555-342-1241 Larry@test.xyz
				Jimmy Butler Phone Call / Email Follow Up 2:30pm - 2:35pm Jason 634 Golden Ct 342-398-1008
				Cookie Monster Phone Call / Email Follow Up 4:30pm - 4:35pm Jason 12 Sesame St. 212-555-9654 212-784-5214
Saturday 2/11/2017				
Sunday 2/12/2017				
				(10 minutes)
Monday 2/13/2017				Jim Kardashian Phone Call / Email Follow Up 10:30am - 10:35am Jason 3984 Quitessential Ct 123-321-1232

Calendar View - Salesperson

Friday, February 10, 2017 | Previous 10 days | Next 10 days | Go to Today

Date	Unscheduled	8am		9am		10am		11am		12pm		1pm		2pm		3pm		4pm	
		:00	:30	:00	:30	:00	:30	:00	:30	:00	:30	:00	:30	:00	:30	:00	:30	:00	:30
Friday 2/10/2017						Jeremiah Smith Outbound Cold Call 10:00am - 10:05am Jason 503-555-654	Jerrie Underwood Phone Call / Email Follow Up 10:30am - 10:35am Jason 339-939-475 Jerrie@test.:		Chad & Larry Rodman Phone Call / Email Follow Up 11:30am - 11:40am Jason 555-555-551 555-342-124 Larry@test.x						Jimmy Butler Phone Call / Email Follow Up 2:30pm - 2:35pm Jason 342-398-100			Sam Smith Phone Call / Email Follow Up 4:00pm - 4:05pm Jason 256-555-985 256-555-745	Cookie Monster Phone Call / Email Follow Up 4:30pm - 4:35pm Jason 212-555-965 212-784-521
Saturday 2/11/2017																			
Sunday 2/12/2017																			
Monday 2/13/2017							Jim Kardashian Phone Call / Email Follow Up 10:30am - 10:35am Jason 123-321-123							Spaulding P Johnson Phone Call / Email Follow Up 2:00pm - 2:05pm Jason 443-332-342 test@test.xy					
Tuesday 2/14/2017					Indiana Jones Phone Call / Email Follow Up 9:30am - 9:35am Jason 547-555-987 547-888-524		Samira Montes Phone Call / Email Follow Up 10:30am - 10:45am Jason								Pedigree-Sn Phone Call / Email Follow Up 2:50pm - 2:55pm Jason 883-485-195				

Sales Lead View – Manager View

Sales Lead Name	Address Line 1	Email	Phone 1	Cell	Phone Call / Email Follow Up			Walk-In				Sales Lead Info		
					Date ↑	Scheduled Time	Assigned To	Date	Scheduled Time	Duration	Notes	Best Time to Connect	Preferred Communication	Type of Job
Jeremiah Smith	205 West 4th St.		503-555-6547		No Date								Phone	Residential - Remodel
Gene Schlessinger	4567 Main St.		513-555-8745	513-457-6587	2/14/2017 (conf)	9:30am	Jason						Phone	Residential - Remodel
Beau Jones	12312 Catalpa Ct.	abc@xyz.xyz	321-456-7890		2/15/2017 (est)	10:00am	Eric						Phone	
Chad & Larry Rodman	4838 Divey Dr	Larry@test.xyz	555-555-5512	555-342-1241	2/15/2017 (conf)	11:30am	Jason						Phone	Residential - Remodel
Curt Meisner	12 Sesame St.		212-555-9654	212-784-5214	2/15/2017 (conf)	4:30pm	Jason	2/13/2017	12:05pm	30 minutes	Looked at the Silestone samples for a long time. Wants a waterfall on island	11:30am-1:00pm	Phone	Residential - New Build
Jacob Gurasco					2/15/2017 (auto)	8:00am	Eric	2/13/2017 (est)	8:30am	23 minutes		first thing in am	Email	Residential - Remodel
Jerrie Underwood	7756 Southern Way	Jerrie@test.xyz		339-939-4756	2/15/2017 (est)	10:30am	Jason	2/9/2017	10:00am	15 minutes	Jerrie cares about how it's going to look and which colors are popular. Doesn't seem concerned with price.		Email	Residential - New Build
Jimmy Butler	634 Golden Ct			342-398-1008	2/15/2017 (conf)	2:30pm	Jason						Phone	Commercial
Sam Smith	745 Singer Sound		256-555-9856	256-555-7458	2/15/2017 (est)	4:00pm	Nora					after 3pm	Phone	Residential - New Build
Arthur Kross	3838 Kris Krossings	Artie@krosstalk.net	348-338-3939		No Date 2/16/2017	1:45pm	Jason					afternoon	Phone	Residential - Remodel
Jim Kardashian	3984 Quitessential Ct		123-321-1232		2/16/2017 (est)	10:30am	Jason	2/14/2017	10:00am	35 minutes	Took her time and wanted to comparison shop. We'll need to follow up soon.		Phone	Commercial
Spaulding P Johnson	3771 Triptophan Ln	test@test.xyz	443-332-3424		2/16/2017 (est)	2:00pm	Jason	2/14/2017	1:15pm	45 minutes	Was walking by - said he was just going to pop in to browse, but asked lots of questions and stayed for 45 minutes.		Email	Residential - Remodel
Indiana Jones	856 Delores Way		547-555-9878	547-888-5247	2/17/2017 (est)	9:30am	Jason						Phone	Residential - Remodel
Pedigree-Smith	10572 Fake Road		883-485-1958		2/17/2017 (conf)	2:50pm	Jason	2/15/2017	2:45pm	15 minutes		mid afternoon	Phone	Residential - Remodel
Samira Montes	123 Main St.				2/17/2017 (est)	10:30am	Jason	2/15/2017	8:00am	30 minutes	Looked at several samples. Seems to like dark colors. Wants a follow up call in the next couple of days.			Residential - Remodel
Friday Jones	1701 W Alabama St				2/21/2017 (conf)	12:00pm	Jason	2/15/2017	9:18am	15 minutes	lots of small talk. Ultimately learned that he's more inclined toward light colored granite	lunchtime	Phone	Residential - Remodel

Sales Lead View

Salesperson Leads list

Sales Leads

Options... | Views | Save View... | New Sales Lead...

Filters: Sales Lead Info - Opt-out Date is empty
Sales Lead Salesperson is Jason

Sales Lead Name	Next Sched.		Next Sched. - Date ↓	Sales Lead Info - Preferred Communication	Email	Phone 1	Sales Lead Notes	Sales Lead Info			
	Assigned To	Activity						Type of Job	Material Type	Square Feet	Purchase Driver
Spaulding P Johnson	Jason	Phone Call / Email Follow Up	2/16/2017 (est)	Email	test@test.xyz	443-332-3424	The security code on their security gate is 1234 (the same as my luggage)	Residential - Remodel	Granite or Dekton	55	Timliness/Communication
Jim Kardashian	Jason	Phone Call / Email Follow Up	2/16/2017 (est)	Phone		123-321-1232	Only interested in 3 cm material	Commercial	Natural Stone	200	Timliness/Communication
Jimmy Butler	Jason	Phone Call / Email Follow Up	2/15/2017 (conf)	Phone			Money is a concern. Will likely have a job that we'll need to break into 3+ phases	Commercial		850	Bargain-hunter
Jerrie Underwood	Jason	Phone Call / Email Follow Up	2/15/2017 (est)	Email	Jerrie@test.xyz		Carrie's sister	Residential - New Build	Silestone	44	Service
Arthur Kross		Phone Call / Email Follow Up	No Date	Phone	Artie@krosstalk.net	348-338-3939	Don't call on weekends.	Residential - Remodel			

Sales Lead View

Sales Leads with Forgotten Activities

Sales Leads

Options... | Views | Save View... | New Sales Lead...

Filters: At least one Outbound Call or Phone Call / Email Follow Up activity has no start date and is not Canceled
Sales Lead Info - Opt-out Date is empty
Sales Lead has at least one form where Sales Lead Info - Opt-out Reason is not Bought from competitor, No further info given, No purchase, Stopped looking, Unreasonable customer

Sales Lead Name	Address Line 1	Email	Phone 1	Cell	Phone Call / Email Follow Up			Sales Lead Info		
					Date ↑	Scheduled Time	Assigned To	Best Time to Connect	Preferred Communication	Type of Job
Jeremiah Smith	205 West 4th St.		503-555-6547		No Date				Phone	Residential - Remodel
Arthur Kross	3838 Kris Krossings	Artie@krosstalk.net	348-338-3939		No Date 2/16/2017	 1:45pm	 Jason	afternoon	Phone	Residential - Remodel

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Reports

Business Goals
Determine salesperson effectiveness
Calculate sales lead conversion rates
See what everyone has done

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Report – # sales by salesperson

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Report –
jobs,
converted leads,
open leads

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Report – Lead Sources

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Report – # job activities

Report

Options... | Reports | Save Report... | New Report...

Year: 2017

Filters: Activity Type is Walk-In, Inbound Call, Outbound Call, Phone Call / Email Follow Up

Month	Activity Type	Number of Job Activities by Activity Date
January	Inbound Call	1
January	Phone Call / Email Follow Up	3
February	Walk-In	14
February	Inbound Call	7
February	Outbound Call	6
February	Phone Call / Email Follow Up	29

(Rows 1 to 6 of 6)

Practice

Create a Sales Lead Process in your practice database

Toolkit:
http://www.moraware.com/houston2017/managing-sales-leads-with-jobtracker/