Best Practices for Using Leads

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Director of Education

POWER OBJECTS

Microsoft Dynamics CRM Upcoming Events

Date/Time	Event	Category
June 14th, 2013 10:30 pm – 11:30 pm	PowerMailChimp Tips and Tricks	Webinar
June 20th, 2013 10:00 AM -11:00 PM	Dynamics CRM & Marketing	Webinar
July 30th–31st, 2013 8:00 AM - 5:00 PM	CRM User Adoption	Workshop

Updates on upcoming Microsoft Dynamics CRM events will be a part of our monthly newsletter.

POWER OBJECTS

PowerObjects

Microsoft Partner Network

201~~2~~3 PARTNER OF THE YEAR

Microsoft Dynamics CRM Partner of the Year

POWER OBJECTS

Service

Support

CRM

Success

Education

Add-ons

Like

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Goals for Today

GET INSPIRED

Take away new ideas for how Microsoft Dynamics CRM can add value to your organization. Understand the impact of sales and marketing collaboration on the architecture and process of CRM.

GET A PLAN

Feel confident you are making the right process and design decisions for your organization. What you learned about Leads during training or reading online may not apply to your organization. Discover how to modify Microsoft Dynamics CRM to match YOUR business processes.

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Agenda

1. What are Leads?
2. Leads 101 Demo
3. Deciding to use Leads
4. Marketing and Sales Collaboration
5. Lead Qualification Process
6. Questions

POLL #1

Are you using Leads today?

- Yes, successfully
- Yes, but we may need improvement
- Not yet, but we probably should
- No, and don’t think we need to
- I’m not sure

What are Leads?

What are Leads?

People you don't know, and you aren't sure you want to know.

- are they fit for your organization?
- are they looking for your products or services?
- are ready to engage?

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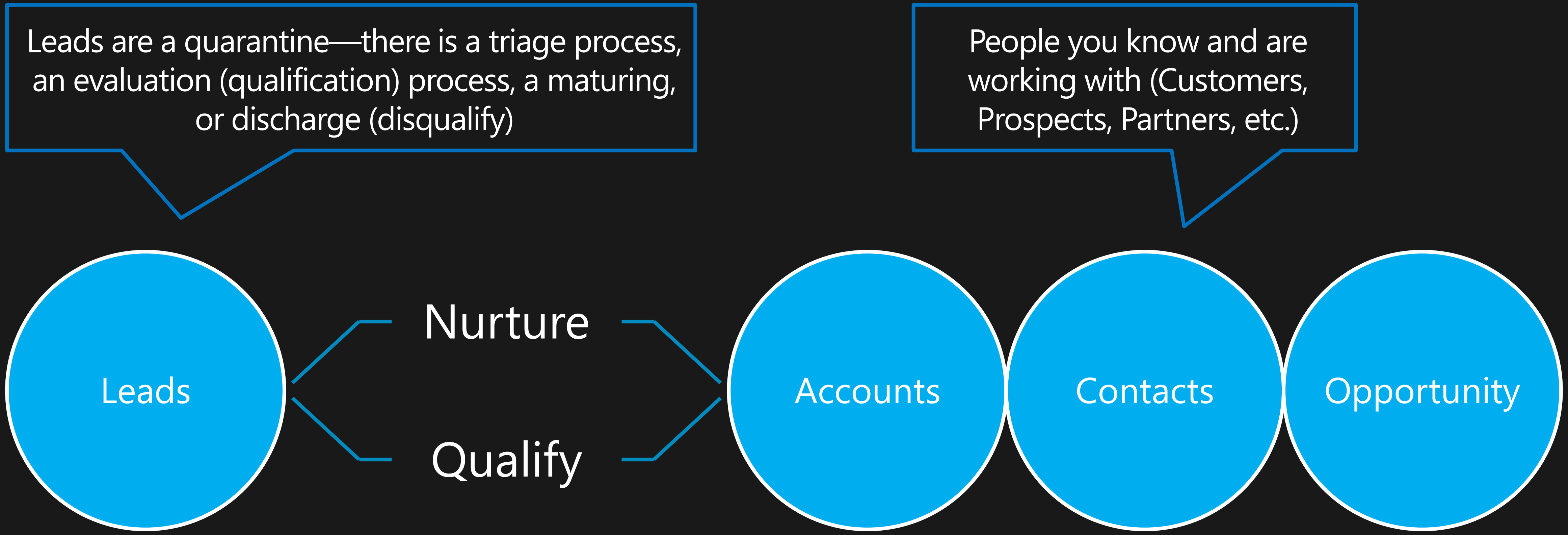
What are Leads?



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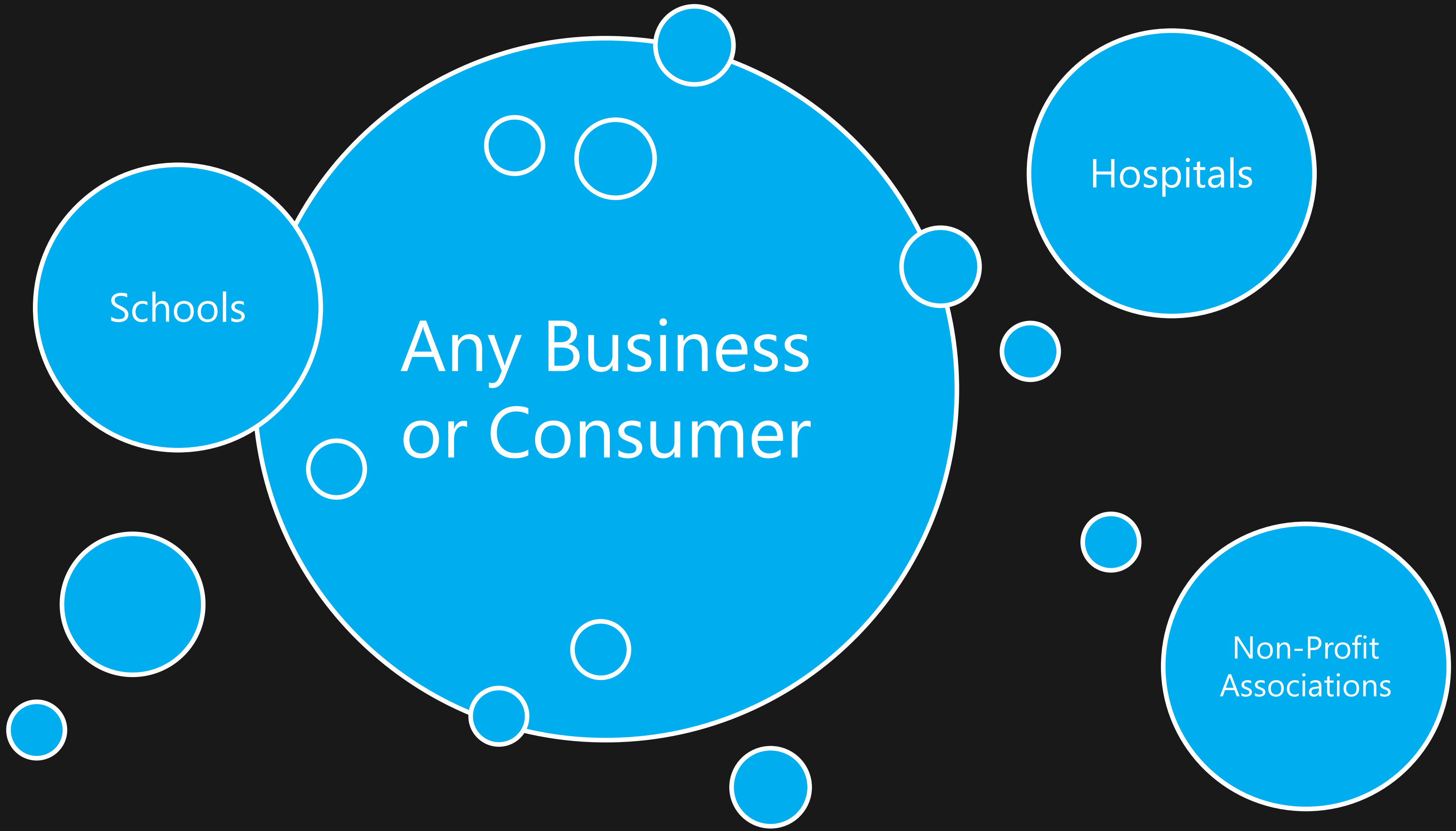
Leads 101 Demo

Are leads right for us?

Deciding to use Leads: Market

- Finite or Infinite?



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POLL #2

- What size is your market?
  - Almost infinite – anyone could be our customer!
  - Large –our target is defined, but it is a large group.
  - Limited – our target is a specific industry or demographic
  - Small – our target is limited group of people we mostly know
  - Combination

Deciding to use Leads: Sales Cycle

Short

Customer Self Service

Call Center

Medium

Weeks or Months

Long

Years

Poll #3

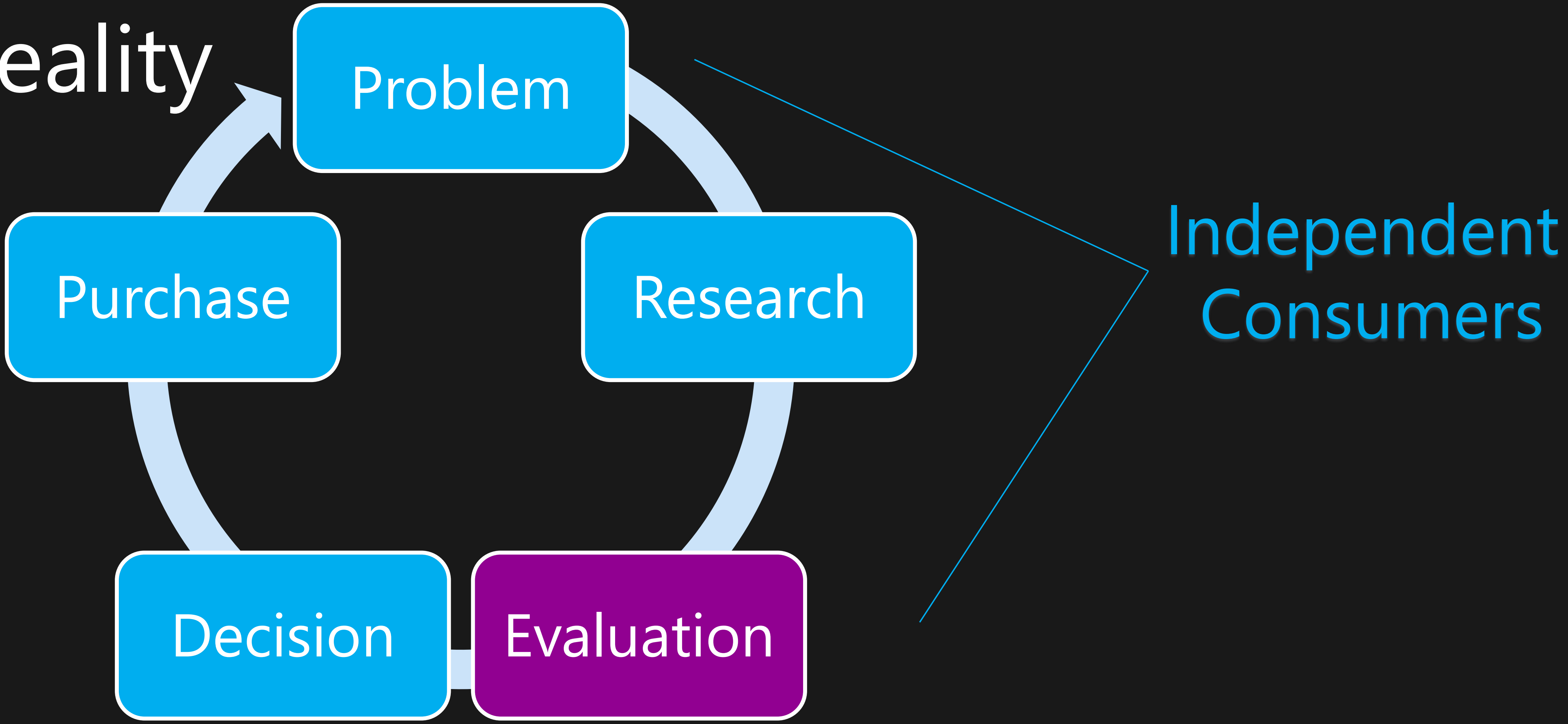
How long is your sales cycle?

- Short
- Medium
- Long
- Combination

Sales and Marketing

Sales and Marketing Collaboration

Reality



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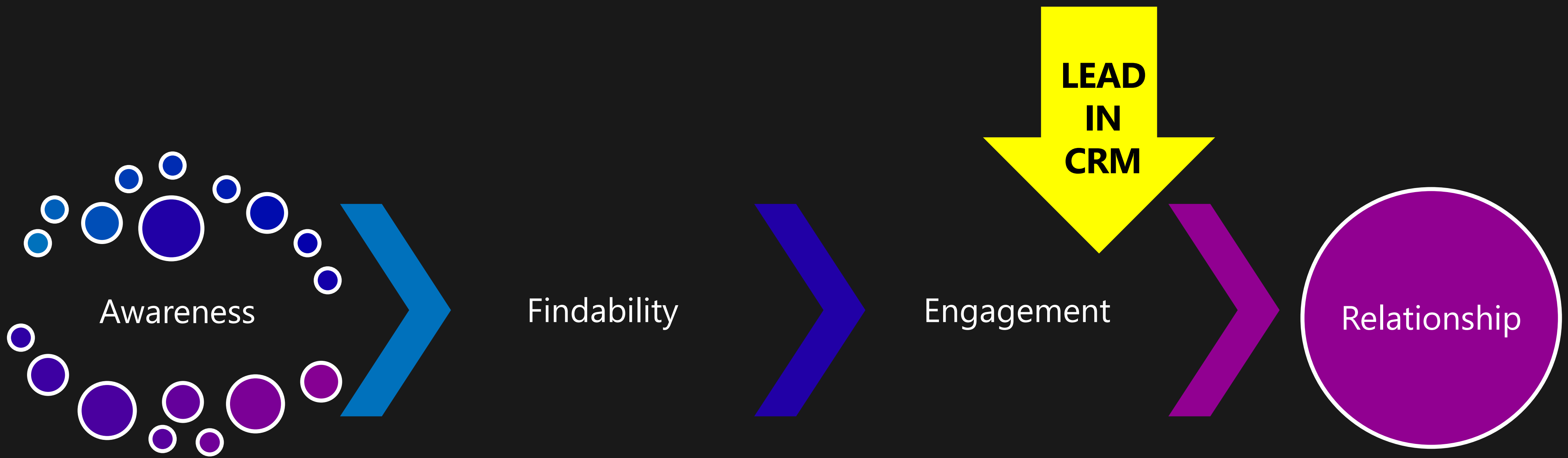
Marketing Lead Generation



Awareness
- Ads
- Viral

Findability
- SEO
- SEM
- Target Marketing

Engagement
- Hook
- Hand Raising

Lead Generation

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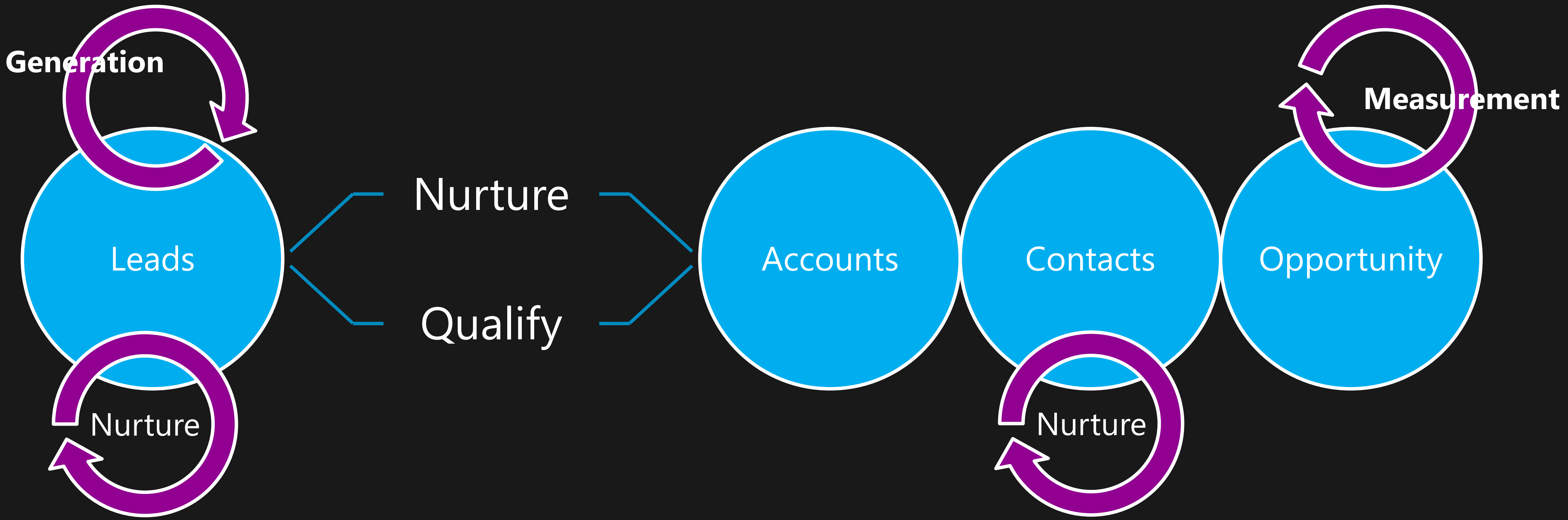
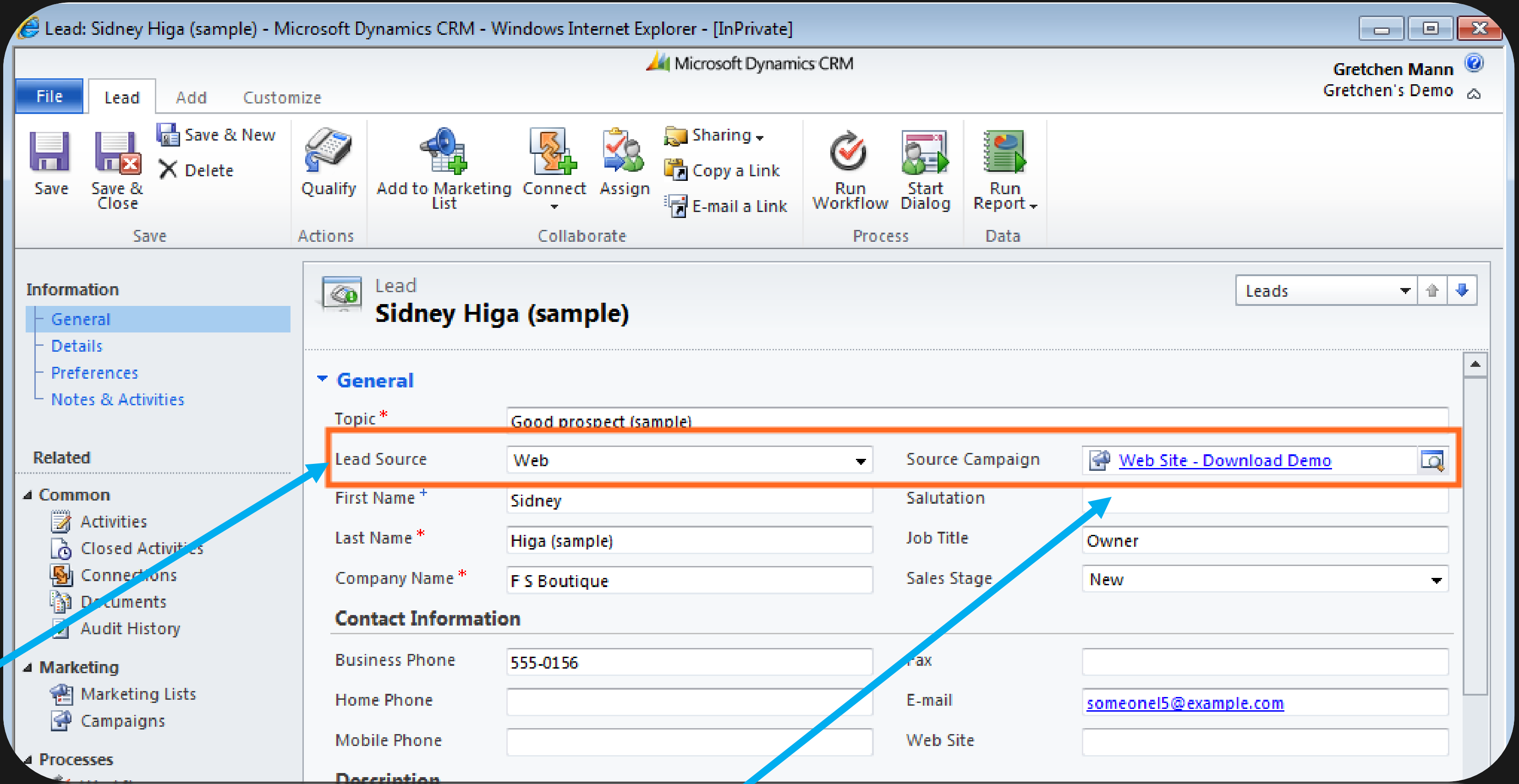
Sales and Marketing Collaboration



Built-in Tools for Marketers

Inbound Campaigns

- Purchasing Lists
- Inquiries
    - Website
    - Advertising
    - Phone
- Tradeshows
- Event Registration



Generic

Specific
ties to $$$ - ROI

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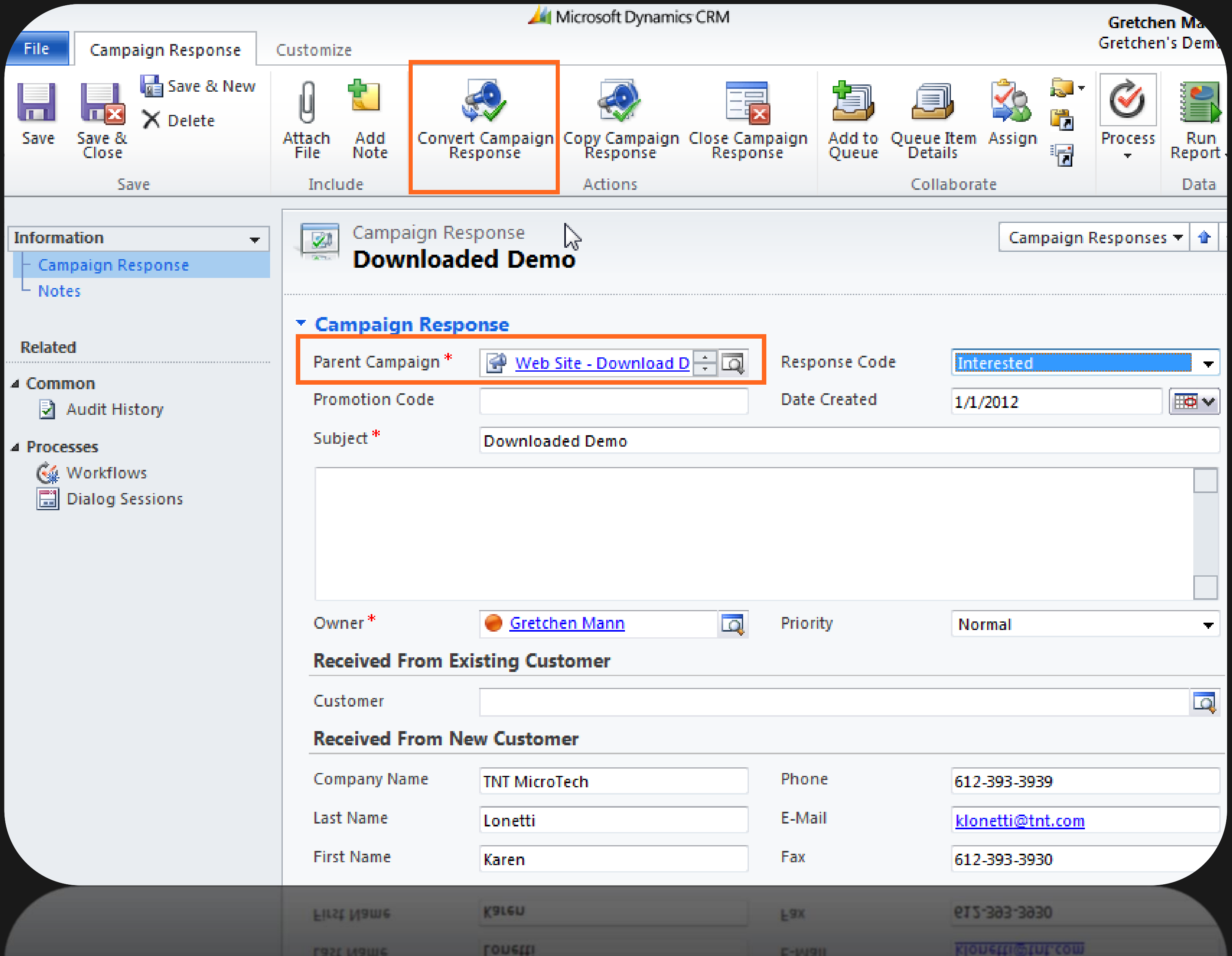
In bound from people you know



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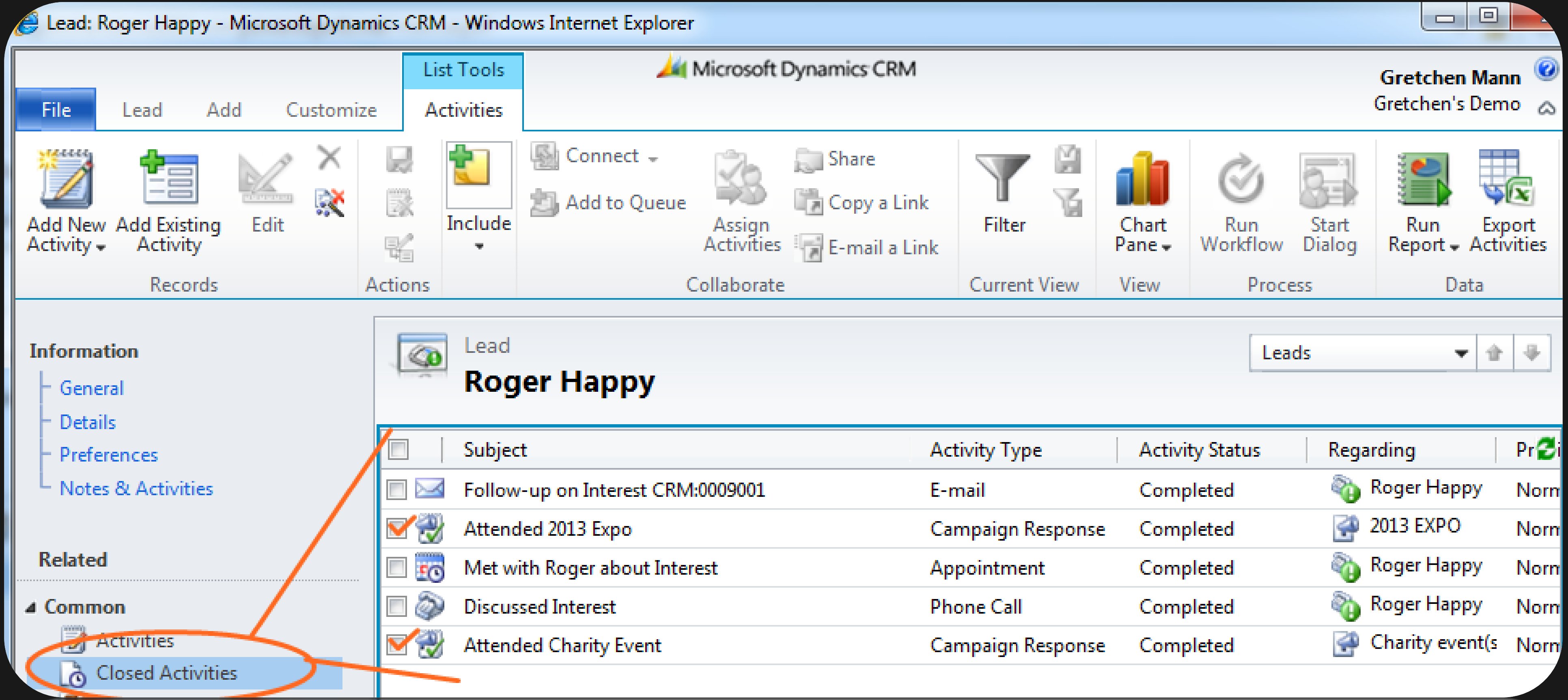
Campaign Response History



http://www.powerobjects.com/blog/2013/01/24/using-campaign-responses-in-crm-2011/

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Poll #4

How important is tracking of Marketing ROI to you?

- Very important – we make decisions based on this
- Somewhat – we think it’s interesting
- Not much – it’s not worth it to track
- We’re still deciding

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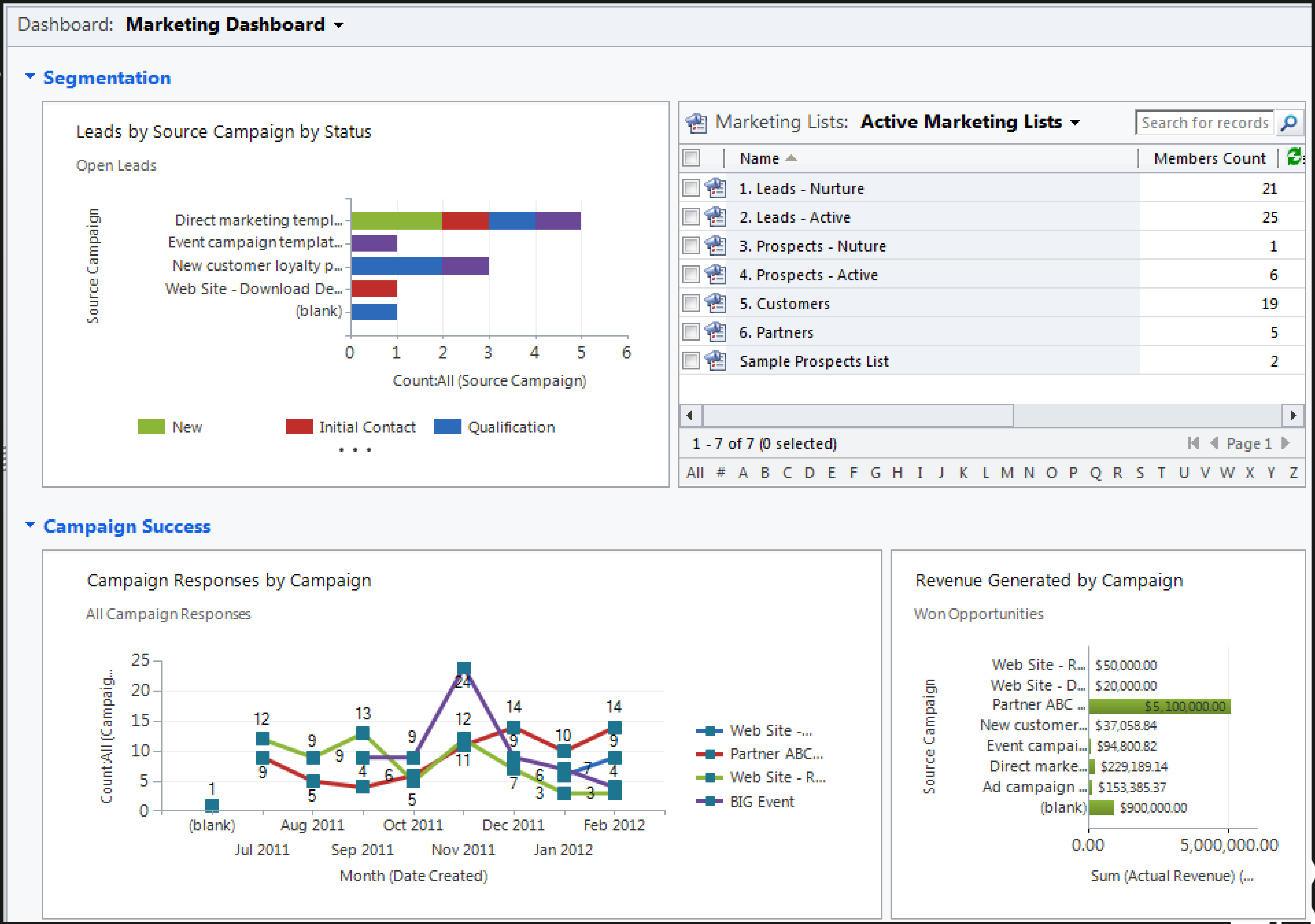

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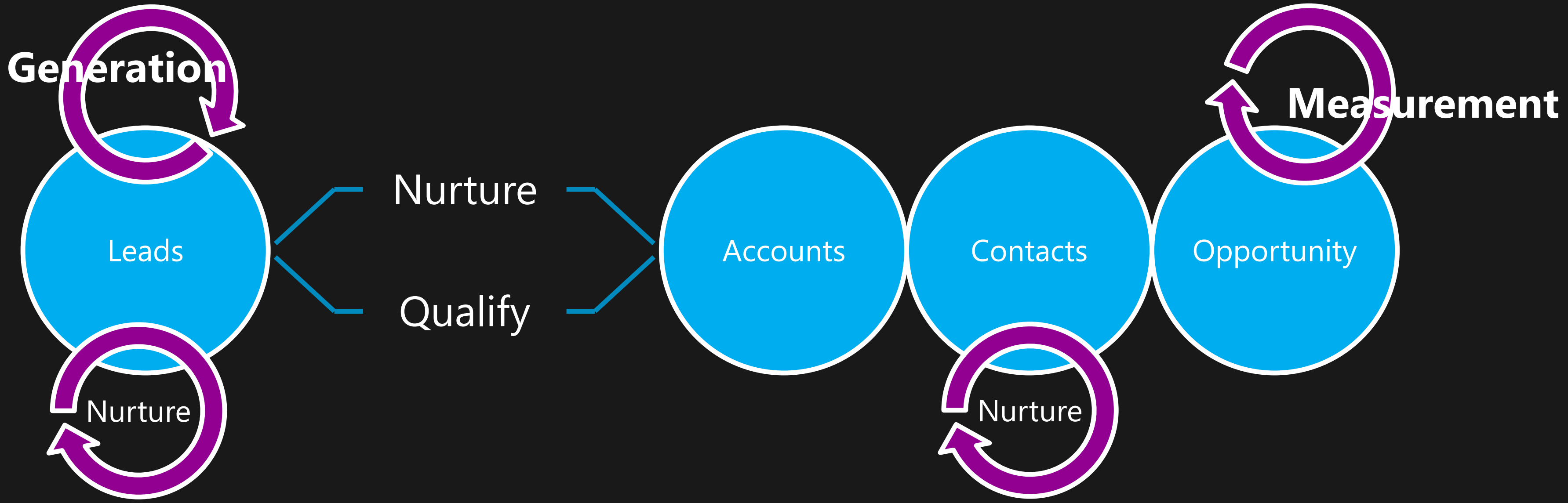
Built-in Tools for Marketers

Out-Bound Campaigns

- Email Blasts*
- Phone Call Blitzes
- Mailings
- Event Promotion



Tools for Marketers

Power Pack

- PowerAutoNumber
- PowerBarcode
- PowerCharge
- PowerEmail
- PowerFind
- PowerGlobalSearch
- PowerMailChimp
- PowerMap
- PowerOneView
- PowerPhoto
- PowerScore
- PowerShare
- PowerSMS
- PowerSocial
- PowerSurvey
- PowerWebForm
- PowerWebTraffic
- PowerZapEvent

POWERSCORE

Tweet 0 | +1 0 | Like 0 | Share

PowerScore | Resources | FAQs | Helpful Videos | 30 Day Trial

How can we rank our CRM contacts and leads? PowerScore to the rescue! PowerScore is a simple solution that allows you to score your leads and contacts based on their behavior. It's simple! You define your scoring rules and you're done. Then sit back and let the cream of the crop float to the top!

PowerScore lets you score Leads and Contacts based on:

- Web Traffic
- Web Forms
- Surveys
- Downloads of Documents
- Attributes of the Lead or Contact such as Job Title or Industry
- Opened E-Mails
- Clicked Through Links

You define your rules for your CRM. Examples include:

- The person visited our website x number of times

Get Started
Coming Soon!

Import File
Coming Soon!

Import Guide
Coming Soon!

User Guide
Coming Soon!

Contact Us

Pricing

$1/CRM user/month* OR free if you have 2 of any of the following add-ons: PowerMailChimp, PowerEmail, PowerSurvey, PowerWebForm, PowerShare.

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Qualifying Process

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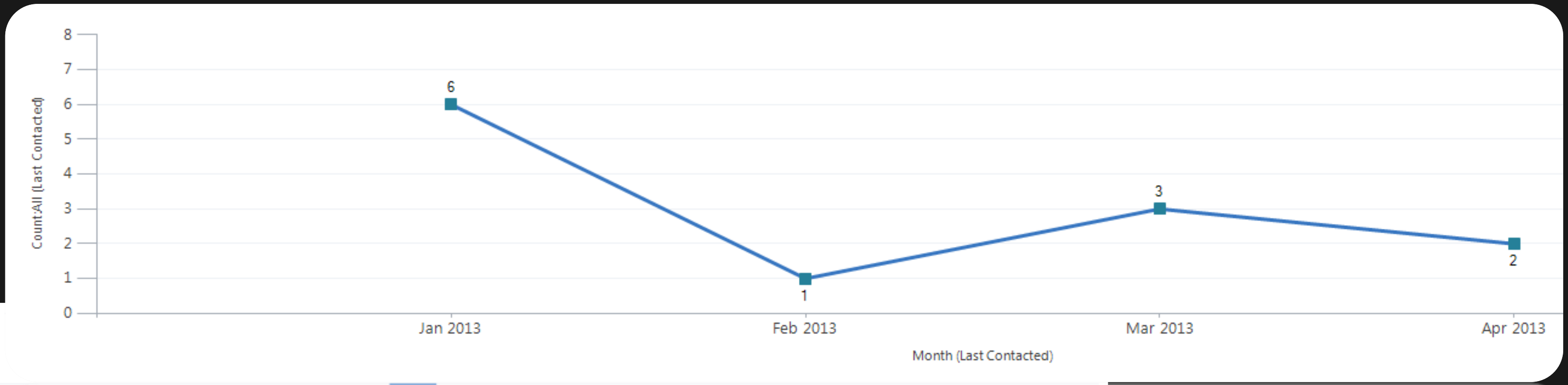
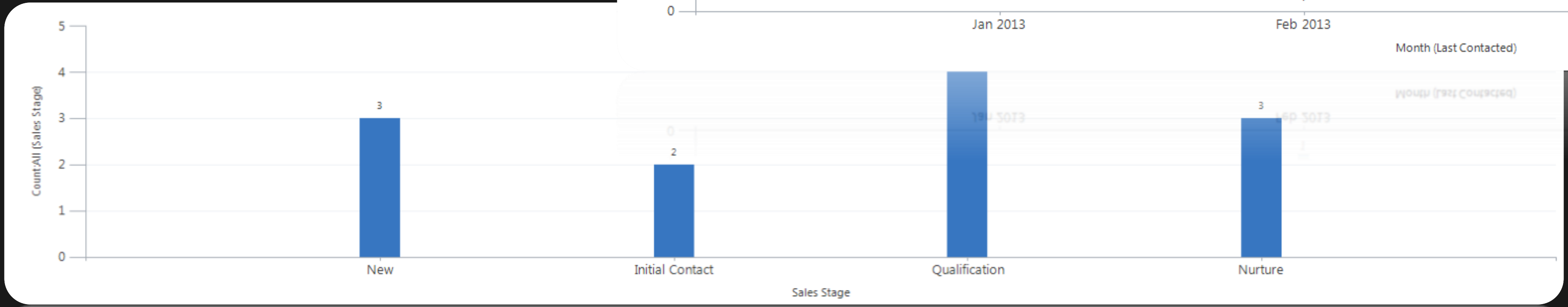
Lead Success

- #1 Always Use Leads
- #2 Automate Assignment
- #3 View and Measure Leads





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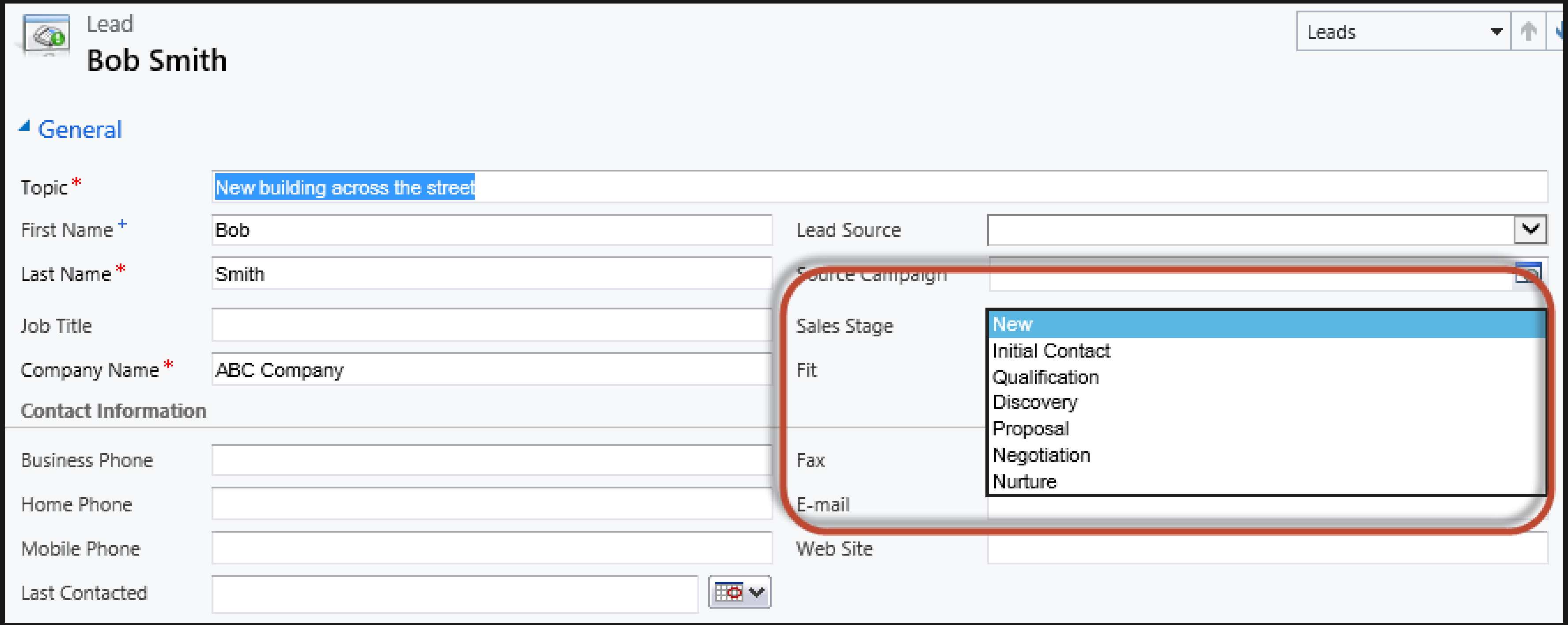
Poll #5

What version of CRM are you on?

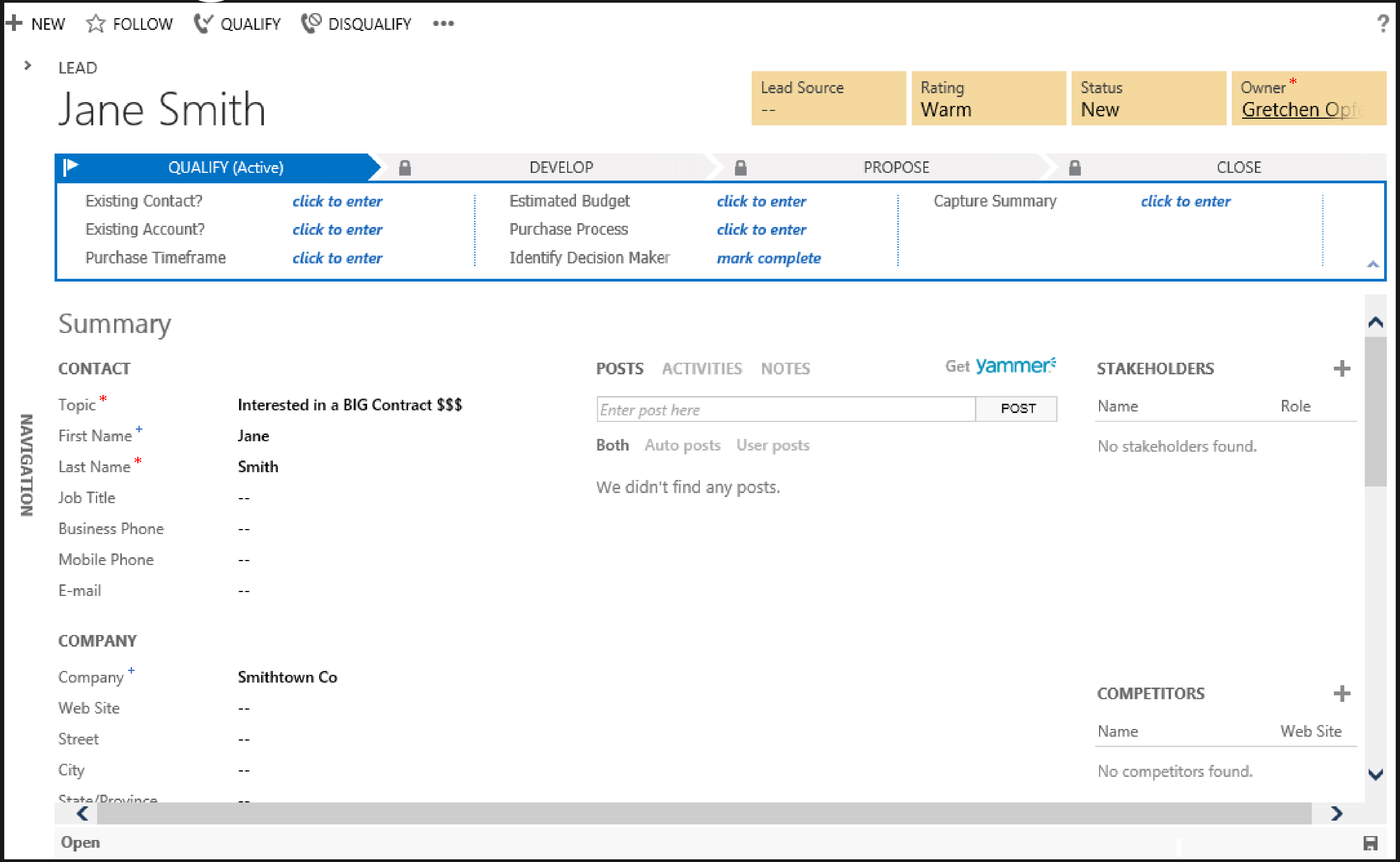
- CRM Online
- CRM On-Premise or Hosted 2011
- CRM On-Premise or Hosted 4.0
- Not Sure

Driving Lead Status

- Status can be connected to Opportunity Status



Driving Lead Status



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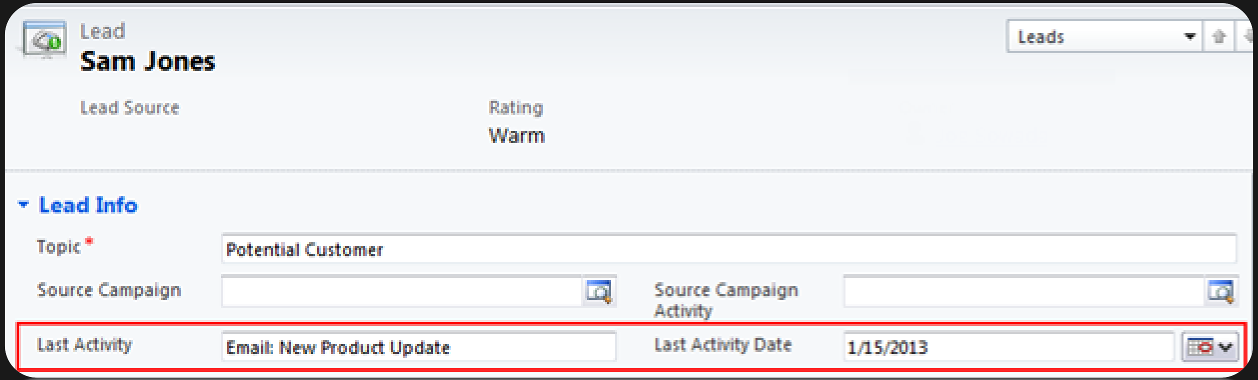
Driving Lead Status

- Suggested #s on the sales scorecard
  - Time to Qualify or Mark for Nurture
  - Number of neglected leads based on last contact date



- Focus on short-term – do NOT collect a lot of info on Leads!
- Goal is to disqualify – get them out of the list if there is no potential!

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Capturing Qualifying Information

Organizational Fit
- Size
- Industry
- Location

→ **Account**

Decision Making & Communication Preferences
- Preferred Method of Contact
- Sentiment

→ **Contact**

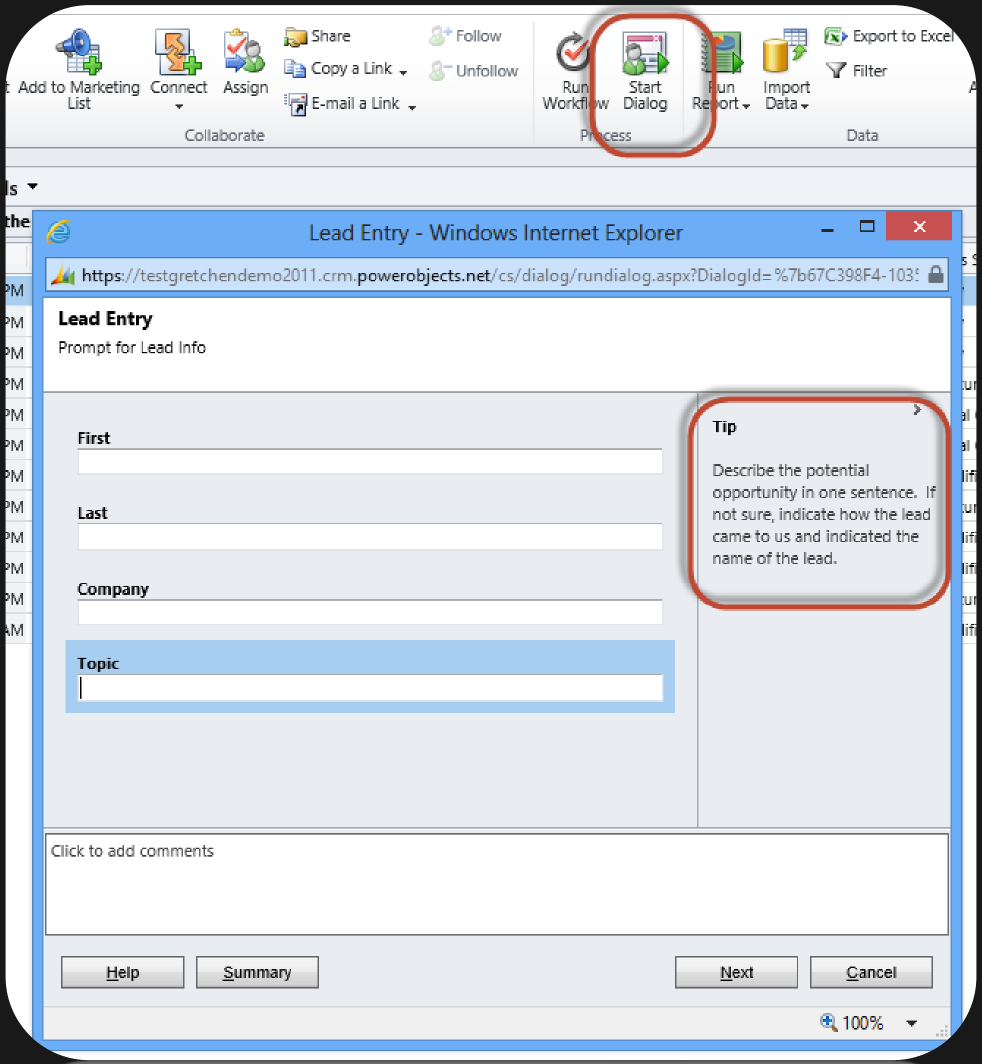
Potential Buying Interest (Topic)
- Needs
- Budget
- Timeline

→ **Opportunity**


Keep it simple.

Consistency

- Simplify
- Use JavaScript for masking
- Use service for data validation
- Use dialog for more descriptions/instructions



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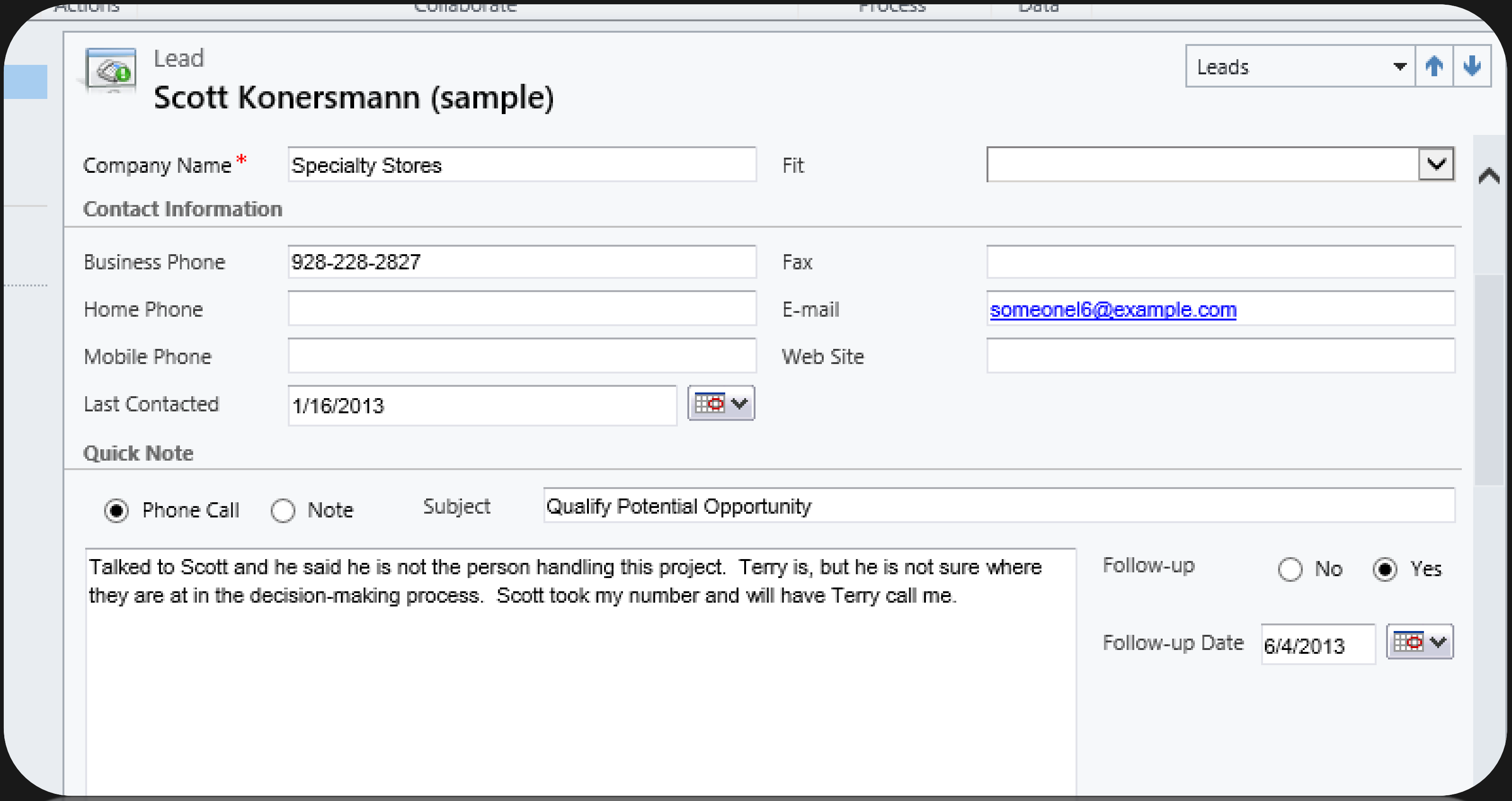
Keeping Notes

- All notes should be recorded as Activities on Leads

- Consider adding a Quick Note section



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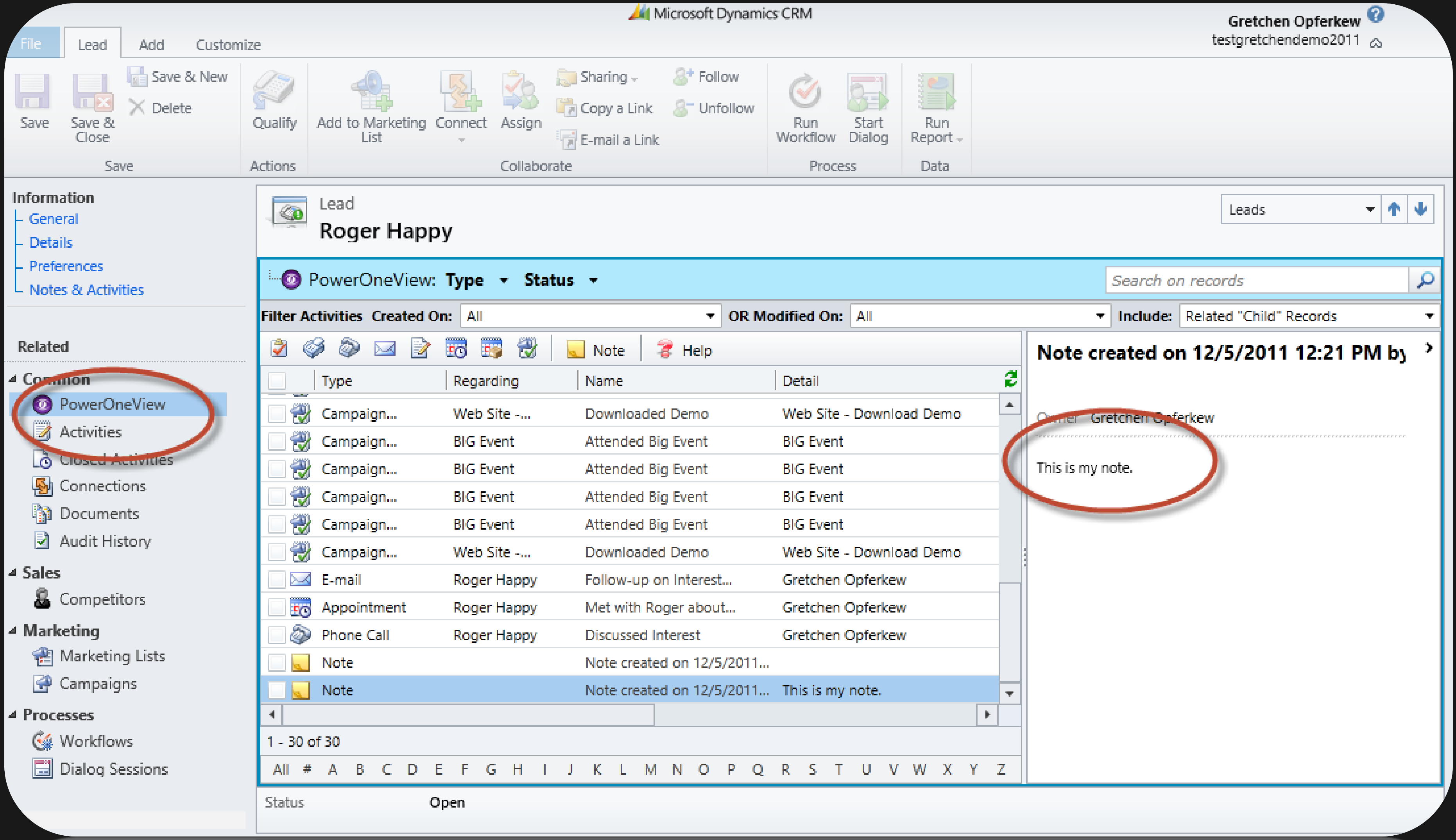
Seeing Notes



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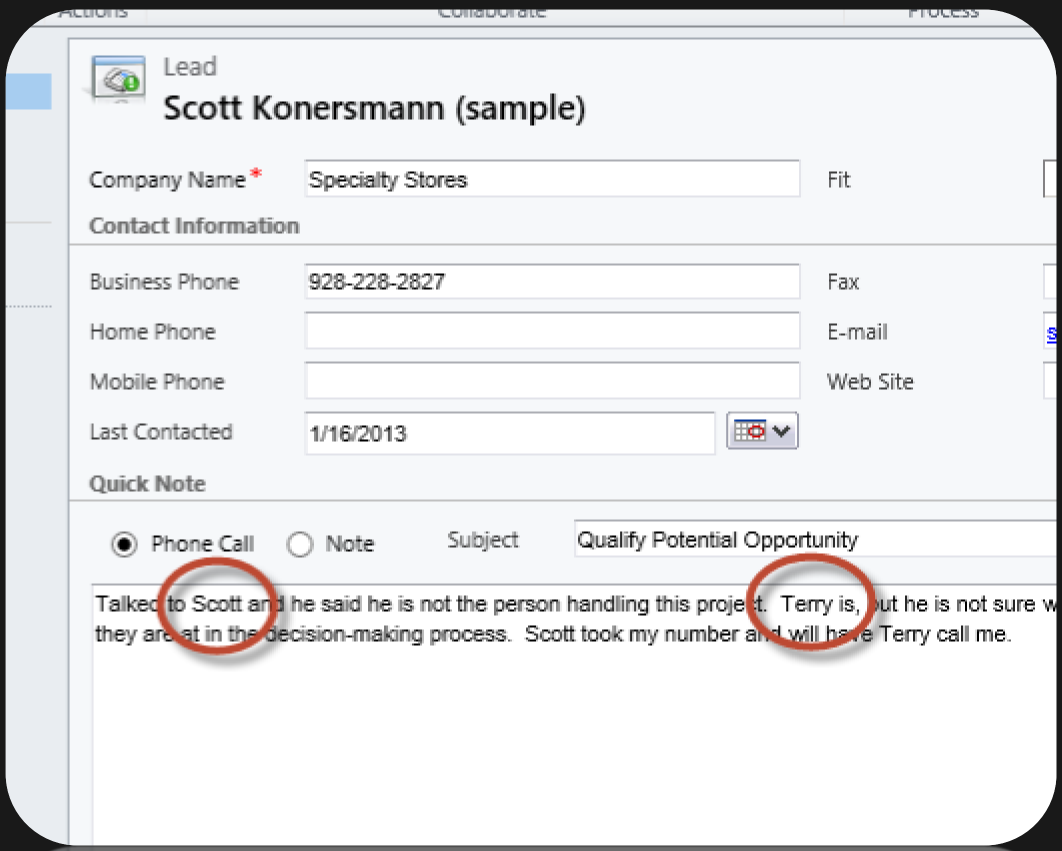
When to Convert

- There is an opportunity (to put in the pipeline)

OR

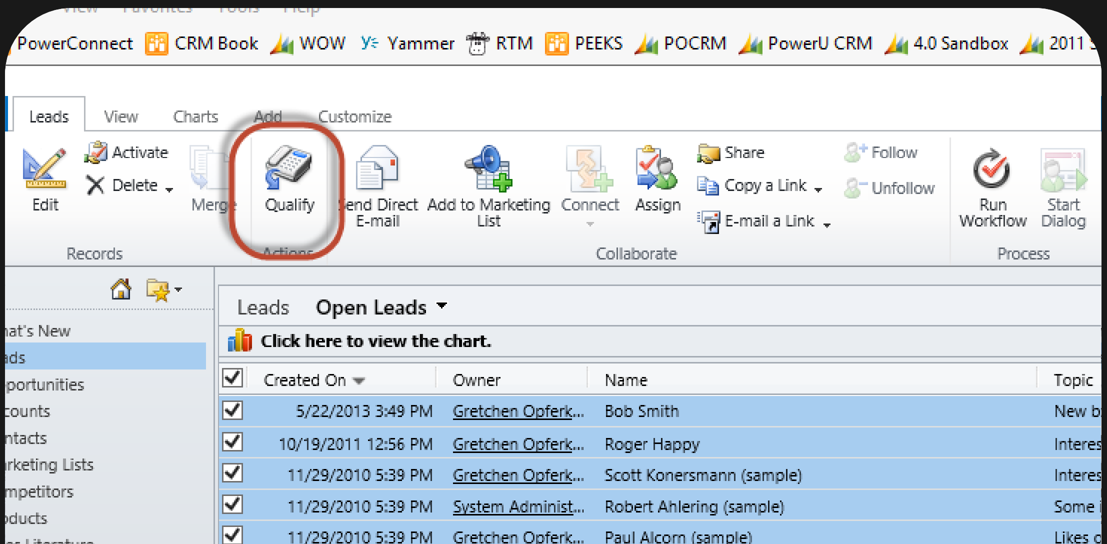
- There is a fit and you want to build a relationship



Questions?

FAQ

- Once a Lead is converted, can it be made a lead again?
- Can we modify the Lead conversion page?
- Can we rename Leads entity?
- Do Leads synchronize with Outlook?
- Can you convert leads in bulk?



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