

Best Practices for Using Leads

06.04.2013

Minneapolis, MN

@CRMGretchen

gretchen@power
objects.com

Director of
Education



Gretchen

Microsoft Dynamics CRM Upcoming Events

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

PowerObjects

Microsoft
Partner Network™



³
2012 PARTNER OF THE YEAR
Microsoft Dynamics
CRM Partner of the Year

●●POWER
●OBJECTS



Service



Support



Like

CRM

Success



Education



Add-ons

●●POWER
●OBJECTS

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.

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.

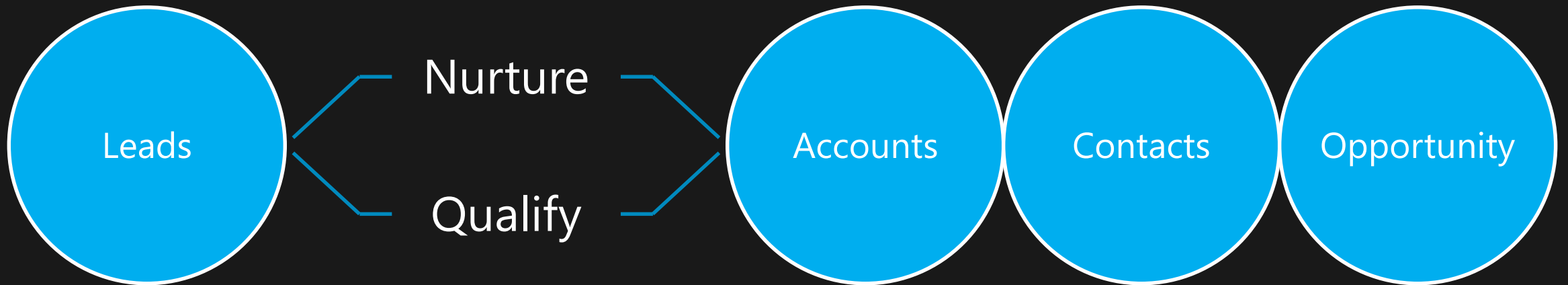
- are they fit for your organization?
- are they looking for your products or services?
- are ready to engage?



What are Leads?

Leads are a quarantine—there is a triage process, an evaluation (qualification) process, a maturing, or discharge (disqualify)

People you know and are working with (Customers, Prospects, Partners, etc.)

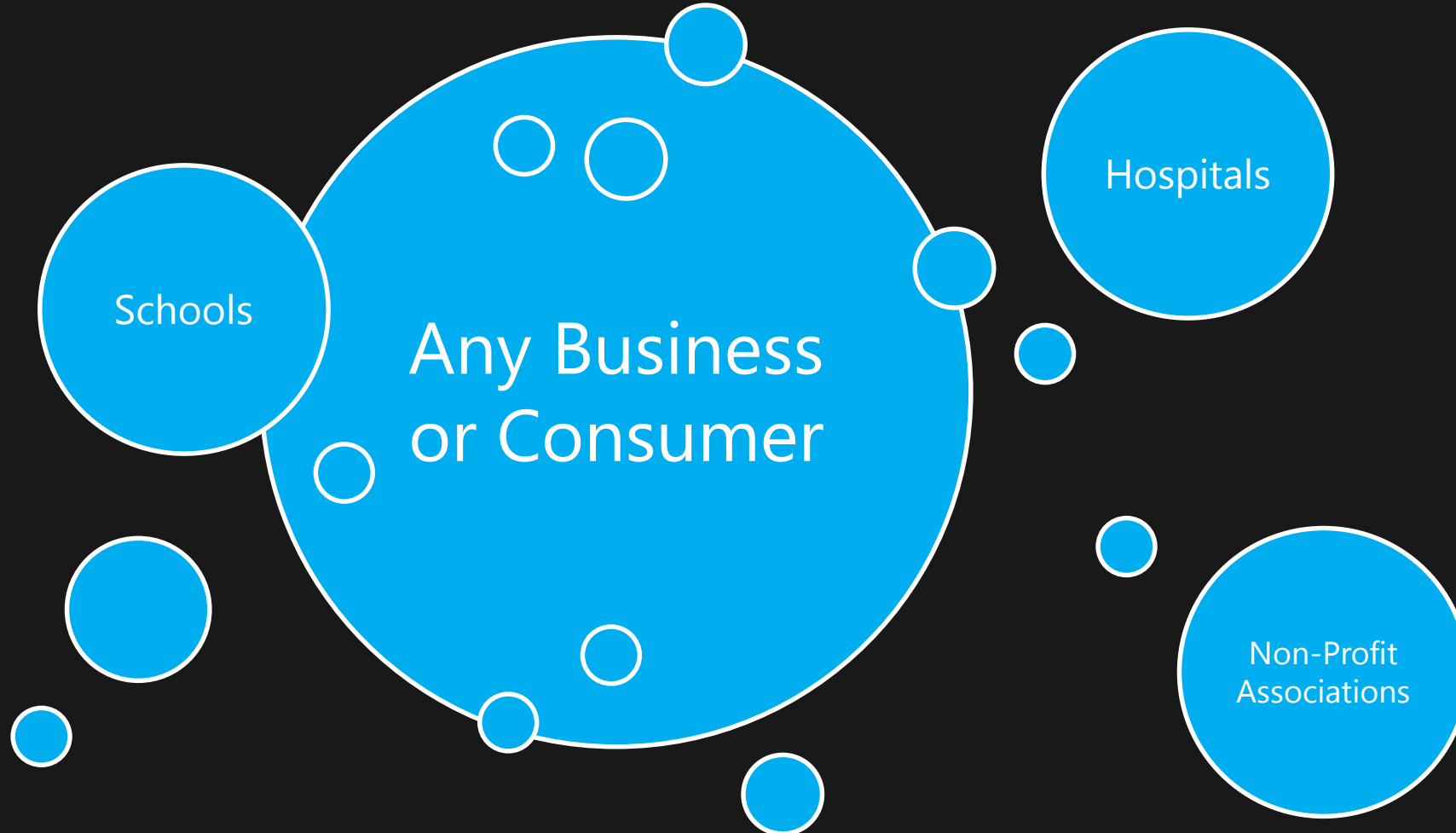


Leads 101 Demo

Are leads right for us?

Deciding to use Leads: Market

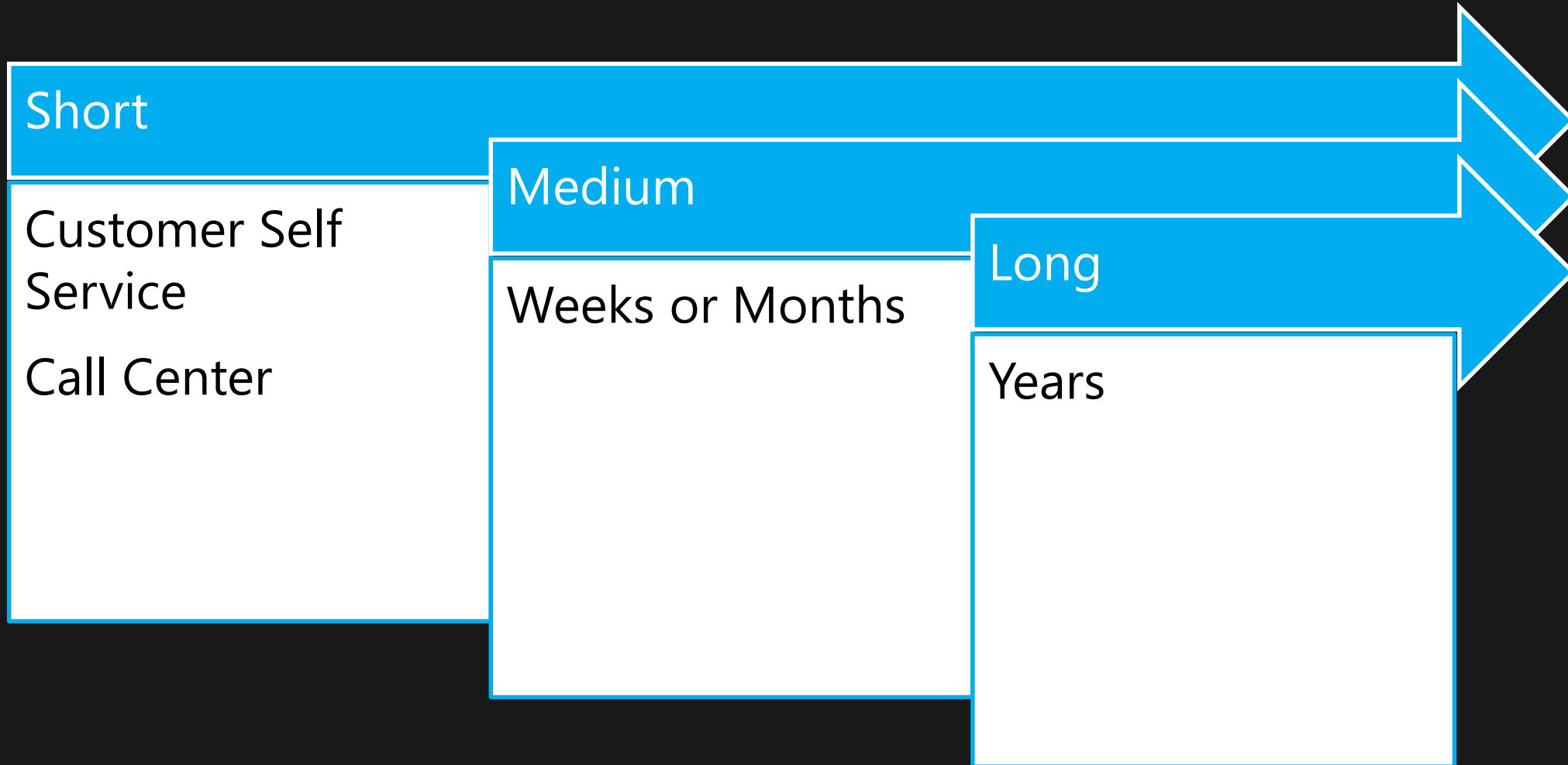
- Finite or Infinite?



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



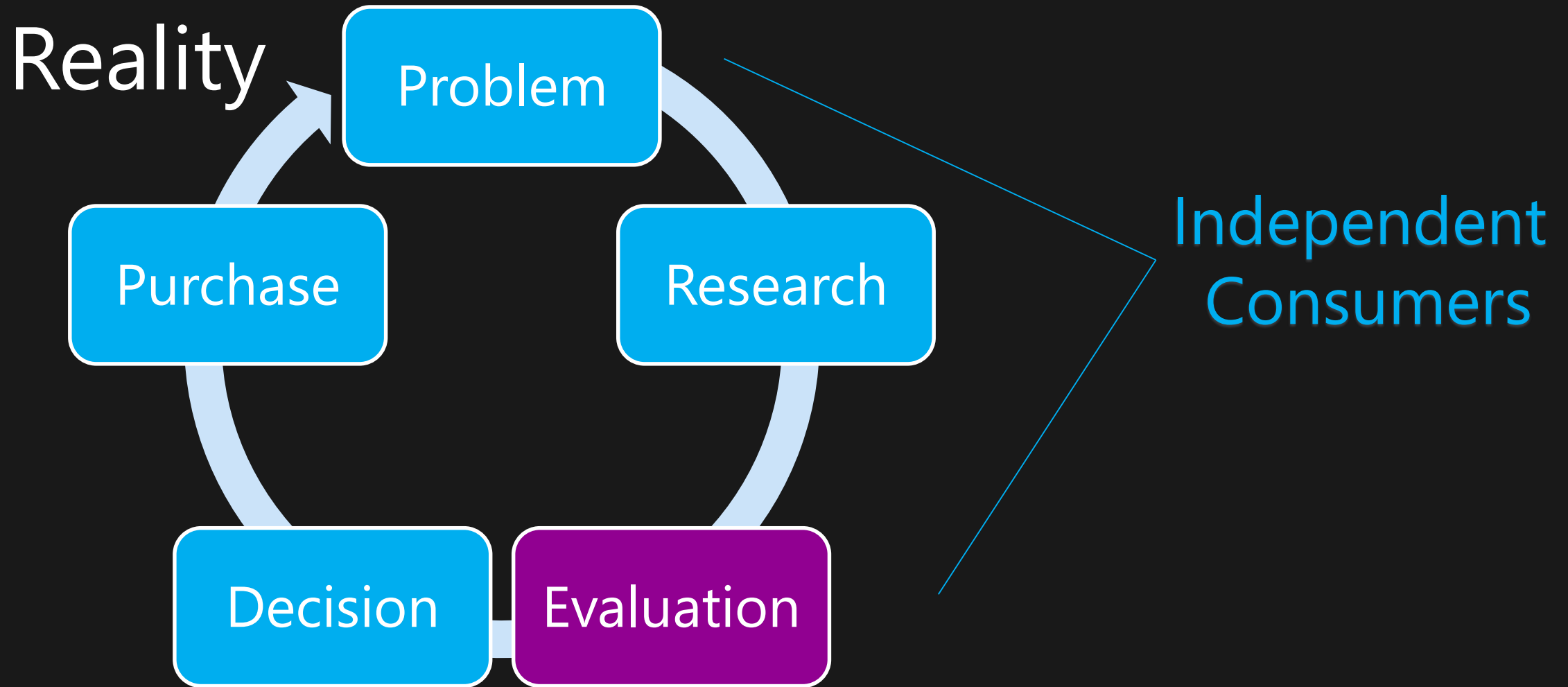
Poll #3

How long is your sales cycle?

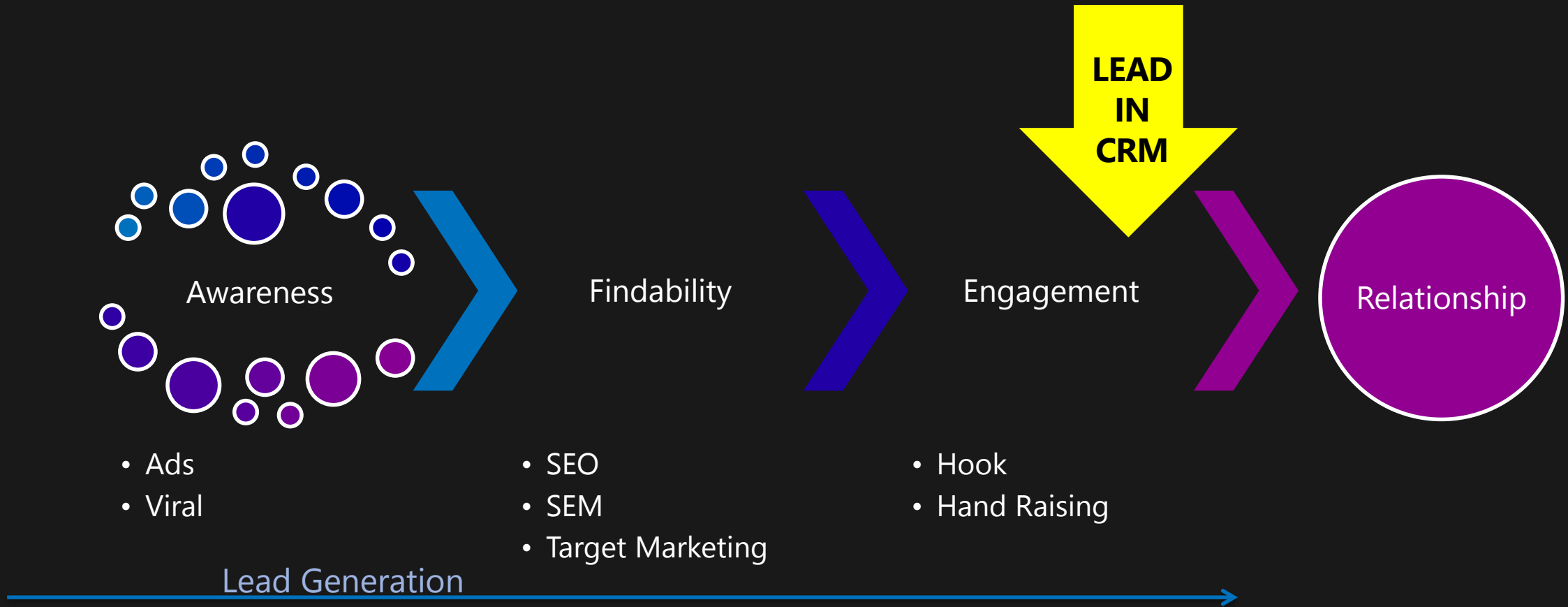
- Short
- Medium
- Long
- Combination

Sales and Marketing

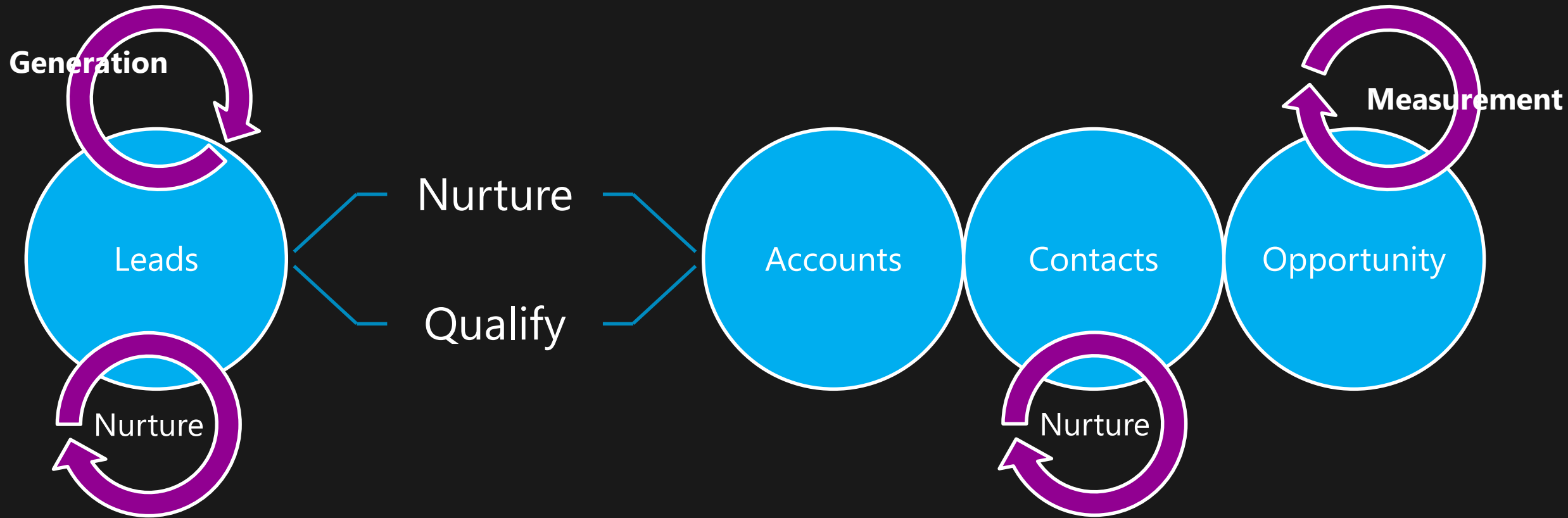
Sales and Marketing Collaboration



Marketing Lead Generation



Sales and Marketing Collaboration



Built-in Tools for Marketers

Inbound Campaigns

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

Generic

Lead: Sidney Higa (sample) - Microsoft Dynamics CRM - Windows Internet Explorer - [InPrivate]

Microsoft Dynamics CRM

Gretchen Mann
Gretchen's Demo

File Lead Add Customize

Save Save & Close Delete

Qualify Add to Marketing List Connect Assign

Sharing Copy a Link E-mail a Link

Run Workflow Start Dialog Run Report

Information

- General
- Details
- Preferences
- Notes & Activities

Related

- Common
 - Activities
 - Closed Activities
 - Connections
 - Documents
 - Audit History
- Marketing
 - Marketing Lists
 - Campaigns
- Processes

Lead Sidney Higa (sample)

Leads

General

Topic * Good prospect (sample)

Lead Source Web Source Campaign Web Site - Download Demo

First Name + Sidney Salutation

Last Name * Higa (sample) Job Title Owner

Company Name * F S Boutique Sales Stage New

Contact Information

Business Phone 555-0156 Fax

Home Phone E-mail someone15@example.com

Mobile Phone Web Site

Description

Specific
ties to \$\$\$ - ROI

In bound from people you know

The screenshot displays the Microsoft Dynamics CRM interface for a Campaign Response record. The ribbon at the top includes the 'Convert Campaign Response' button, which is highlighted with an orange box. The record details show the following information:

- Parent Campaign *:** Web Site - Download D (highlighted with an orange box)
- Response Code:** Interested
- Promotion Code:** (empty)
- Date Created:** 1/1/2012
- Subject *:** Downloaded Demo
- Owner *:** Gretchen Mann
- Priority:** Normal

Below the main fields, there are sections for 'Received From Existing Customer' and 'Received From New Customer' with associated form fields.

Received From New Customer			
Company Name	TNT MicroTech	Phone	612-393-3939
Last Name	Lonetti	E-Mail	klonetti@tnt.com
First Name	Karen	Fax	612-393-3930

Campaign Response History

The screenshot shows the Microsoft Dynamics CRM interface for a lead named Roger Happy. The 'List Tools' ribbon is active, and the 'Closed Activities' option in the left-hand navigation pane is highlighted with an orange circle. An orange arrow points from this circle to the 'Closed Activities' section of the main activity list. The activity list contains the following entries:

	Subject	Activity Type	Activity Status	Regarding	Pr
<input type="checkbox"/>	Follow-up on Interest CRM:0009001	E-mail	Completed	Roger Happy	Norm
<input checked="" type="checkbox"/>	Attended 2013 Expo	Campaign Response	Completed	2013 EXPO	Norm
<input type="checkbox"/>	Met with Roger about Interest	Appointment	Completed	Roger Happy	Norm
<input type="checkbox"/>	Discussed Interest	Phone Call	Completed	Roger Happy	Norm
<input checked="" type="checkbox"/>	Attended Charity Event	Campaign Response	Completed	Charity event(s)	Norm

Poll #4

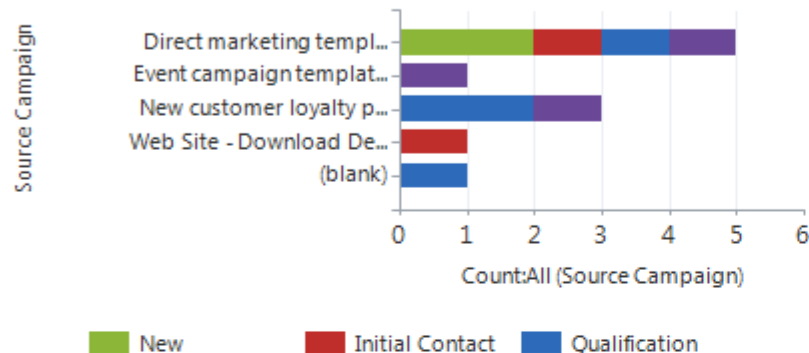
How important is tracking of Marketing ROI to you?

- 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

▾ **Segmentation**

Leads by Source Campaign by Status

Open Leads



Marketing Lists: **Active Marketing Lists** ▾

Search for records 🔍

<input type="checkbox"/>	Name ▲	Members Count
<input type="checkbox"/>	1. Leads - Nurture	21
<input type="checkbox"/>	2. Leads - Active	25
<input type="checkbox"/>	3. Prospects - Nurture	1
<input type="checkbox"/>	4. Prospects - Active	6
<input type="checkbox"/>	5. Customers	19
<input type="checkbox"/>	6. Partners	5
<input type="checkbox"/>	Sample Prospects List	2

1 - 7 of 7 (0 selected)

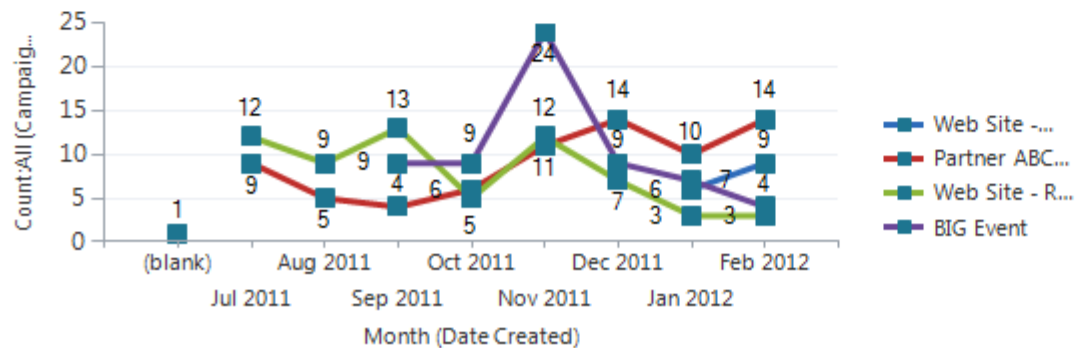
Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

▾ **Campaign Success**

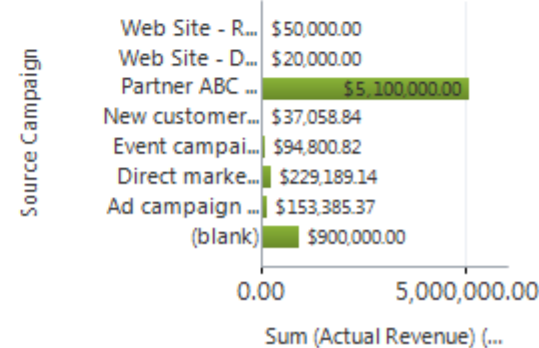
Campaign Responses by Campaign

All Campaign Responses



Revenue Generated by Campaign

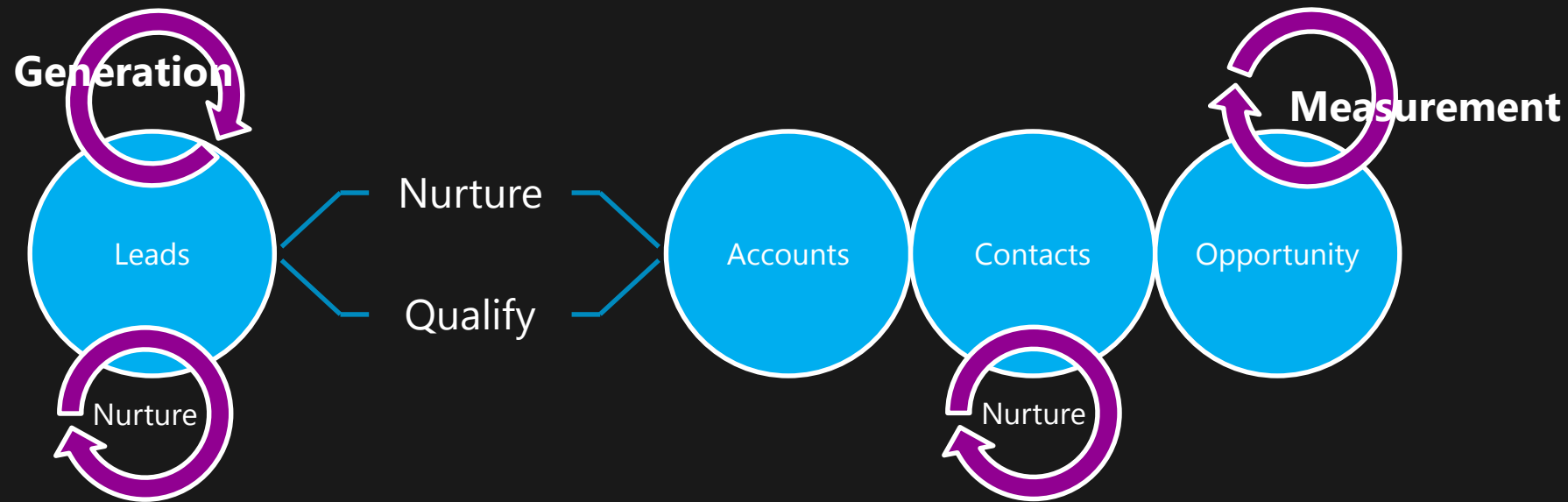
Won Opportunities



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
- PowerGlobal Search
- 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

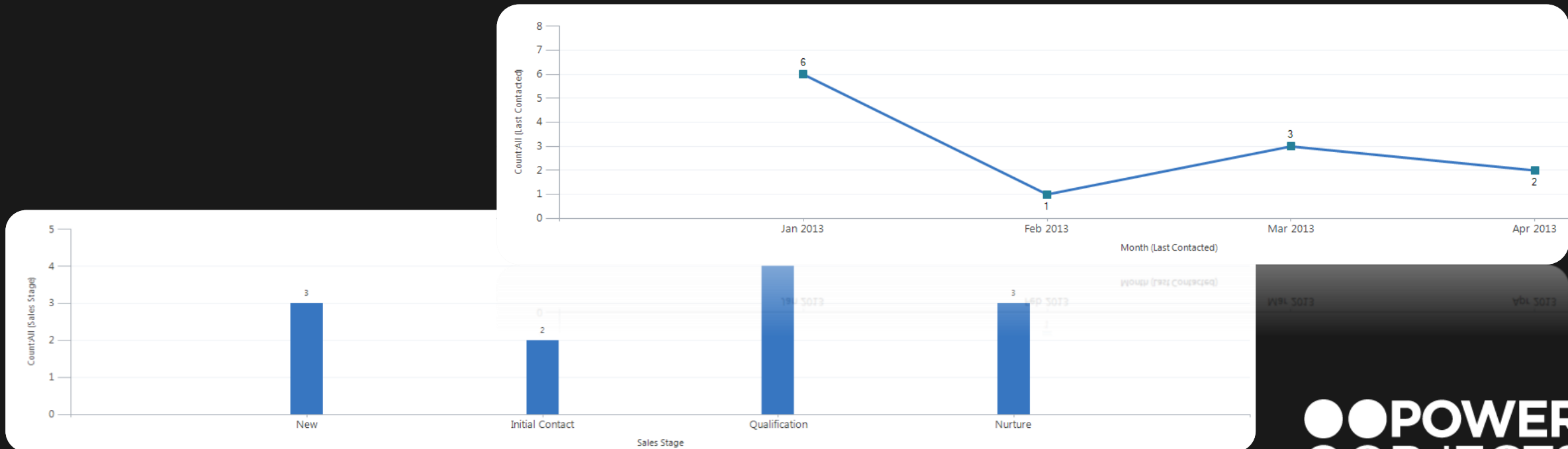
\$1/CRM user/month* OR free if you have 2 of any of the following add-ons: PowerMailChimp, PowerEmail, PowerSurvey, PowerWebForm, PowerShare.



Qualifying Process

Lead Success

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



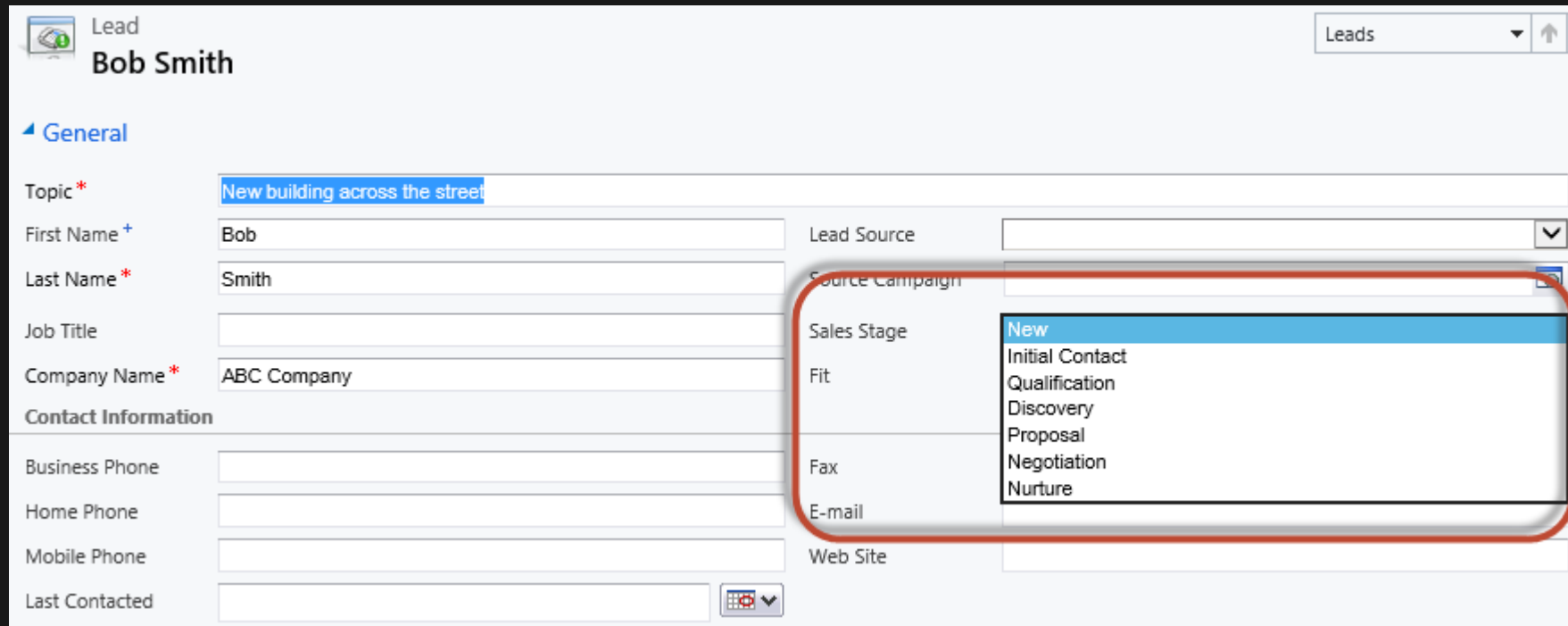
Poll #5

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



The screenshot shows a CRM interface for a lead named Bob Smith. The 'General' tab is active, displaying fields for Topic, First Name, Last Name, Job Title, and Company Name. A dropdown menu for 'Sales Stage' is open, showing options: New, Initial Contact, Qualification, Discovery, Proposal, Negotiation, and Nurture. The 'New' option is highlighted. A red rounded rectangle highlights the Sales Stage dropdown menu.

Field	Value
Topic*	New building across the street
First Name +	Bob
Last Name*	Smith
Job Title	
Company Name*	ABC Company
Contact Information	
Business Phone	
Home Phone	
Mobile Phone	
Last Contacted	
Lead Source	
Source Campaign	
Sales Stage	New
Fit	
Fax	
E-mail	
Web Site	

Driving Lead Status

+ NEW ☆ FOLLOW 🗑️ QUALIFY 🗑️ DISQUALIFY ... ?

> LEAD

Jane Smith

Lead Source	--	Rating	Warm	Status	New	Owner*	Gretchen Opfi
-------------	----	--------	------	--------	-----	--------	---------------

▶ QUALIFY (Active) 🔒 DEVELOP 🔒 PROPOSE 🔒 CLOSE

Existing Contact?	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Summary

CONTACT

Topic*	Interested in a BIG Contract \$\$\$
First Name+	Jane
Last Name*	Smith
Job Title	--
Business Phone	--
Mobile Phone	--
E-mail	--

COMPANY

Company+	Smithtown Co
Web Site	--
Street	--
City	--
State/Province	--

POSTS ACTIVITIES NOTES

Get Yammer

Enter post here POST

Both Auto posts User posts

We didn't find any posts.

STAKEHOLDERS +

Name	Role
No stakeholders found.	

COMPETITORS +

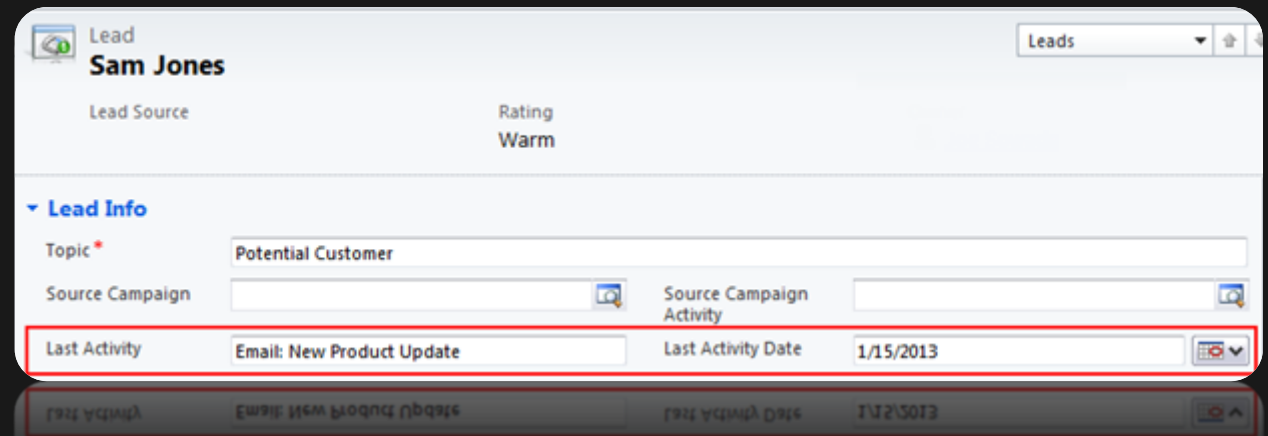
Name	Web Site
No competitors found.	

NAVIGATION

Open

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

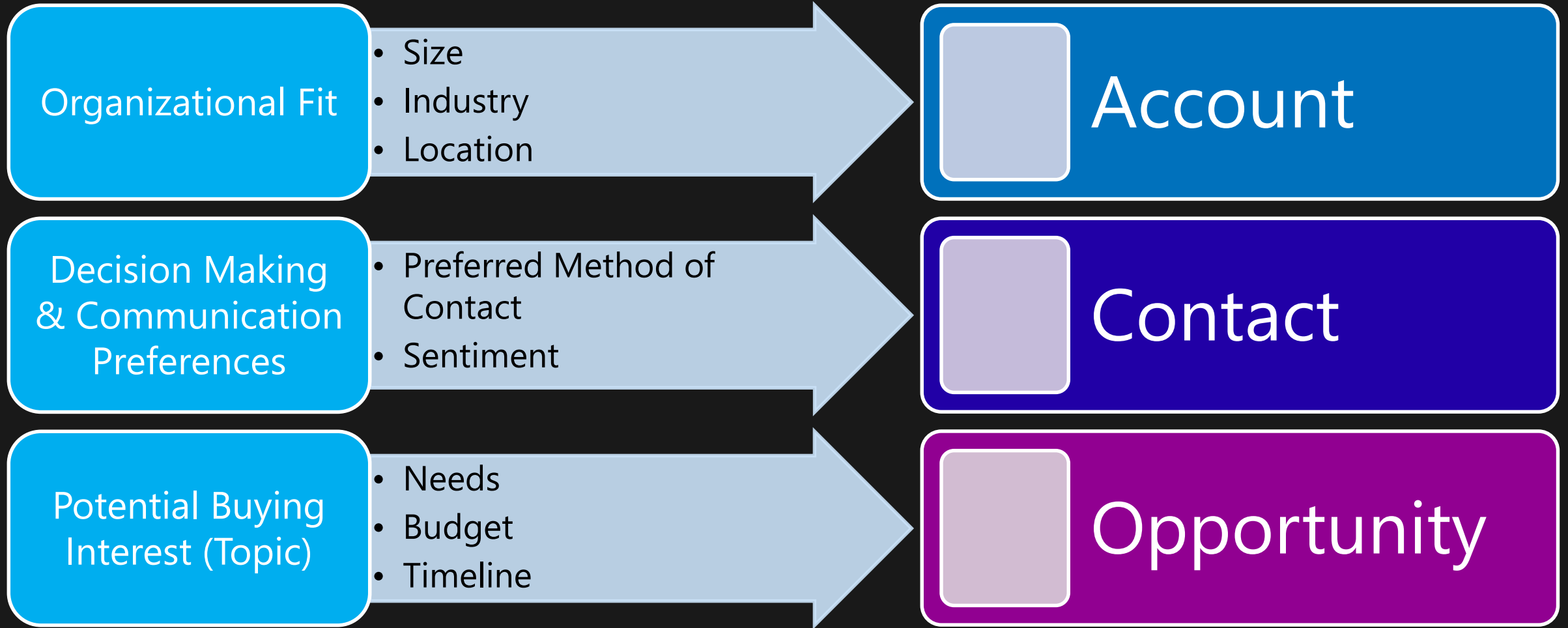


The screenshot shows a CRM interface for a lead named Sam Jones. The lead source is blank, and the rating is 'Warm'. Under the 'Lead Info' section, the topic is 'Potential Customer'. The source campaign and source campaign activity fields are also blank. The last activity is 'Email: New Product Update' and the last activity date is '1/15/2013'. A red box highlights the last activity and date fields.

Lead	Sam Jones	Leads
Lead Source		Rating Warm
Lead Info		
Topic *	Potential Customer	
Source Campaign		Source Campaign Activity
Last Activity	Email: New Product Update	Last Activity Date 1/15/2013

- 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!

Capturing Qualifying Information

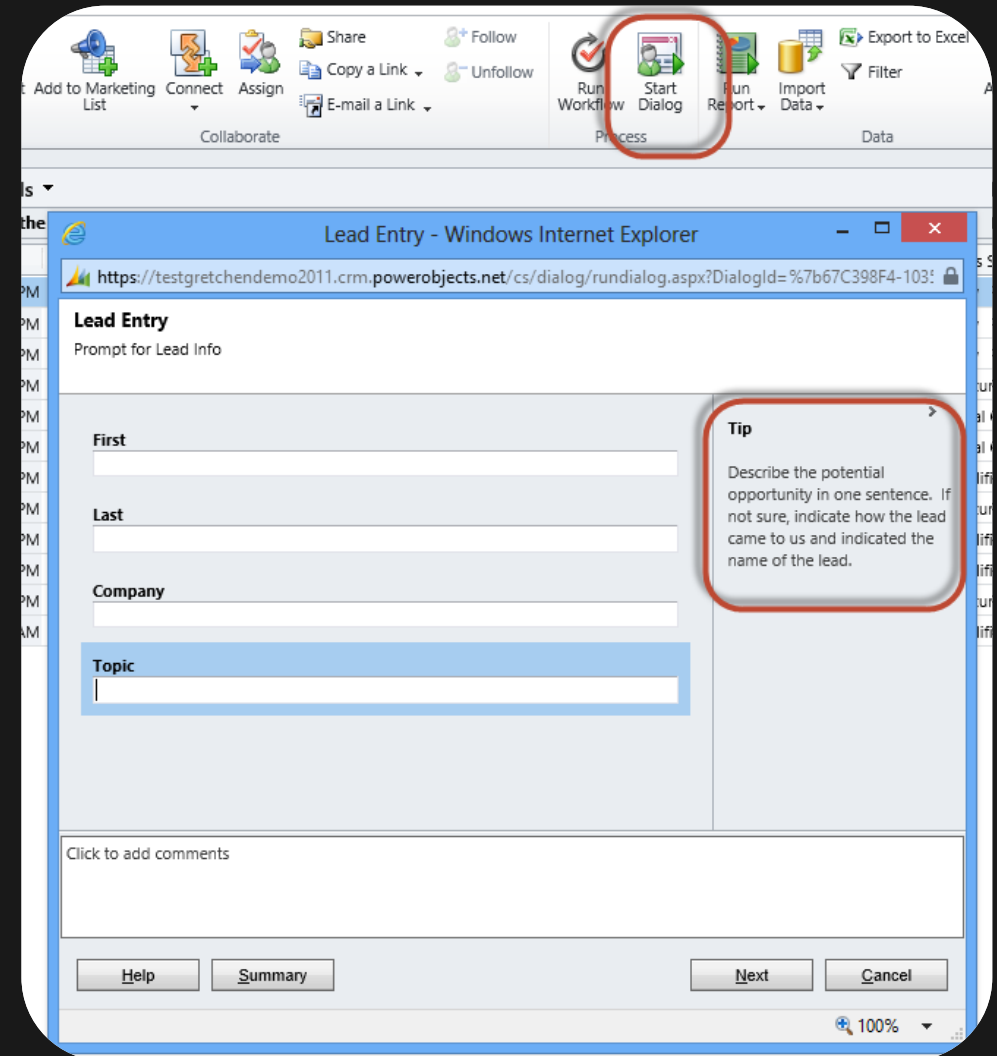


A young child with long, light brown hair is seen from behind, standing on a paved road. The child is wearing a sleeveless top with horizontal stripes in shades of green and white, and blue denim jeans. Their hands are on their hips, and they are looking out over a vast, open landscape. The road is paved and has a yellow dashed line running down the center. The surrounding area is filled with tall grass and some driftwood. The sky is a clear, bright blue with a few wispy clouds. The overall scene is bright and open, suggesting a coastal or rural setting.

Keep it simple.

Consistency

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



Keeping Notes

- All notes should be recorded as Activities on Leads
- Consider adding a Quick Note section

The screenshot displays a CRM interface for a lead record. At the top, it shows 'Lead Scott Konersmann (sample)' with a 'Leads' dropdown menu and navigation arrows. Below this, there are several input fields for contact information: 'Company Name' (Specialty Stores), 'Fit' (dropdown), 'Business Phone' (928-228-2827), 'Fax' (empty), 'Home Phone' (empty), 'E-mail' (someone16@example.com), 'Mobile Phone' (empty), and 'Web Site' (empty). The 'Last Contacted' field is set to 1/16/2013. A 'Quick Note' section is visible, with radio buttons for 'Phone Call' (selected) and 'Note', and a 'Subject' field containing 'Qualify Potential Opportunity'. The note text reads: 'Talked to Scott and he said he is not the person handling this project. Terry is, but he is not sure where they are at in the decision-making process. Scott took my number and will have Terry call me.' To the right of the note, there are 'Follow-up' radio buttons for 'No' and 'Yes' (selected), and a 'Follow-up Date' field set to 6/4/2013.

Seeing Notes

The screenshot displays the Microsoft Dynamics CRM interface for a lead named Roger Happy. The left-hand navigation pane shows the 'PowerOneView' option circled in red. The main area contains a table of activities, with the most recent note circled in red. A pop-up window shows the details of this note, also with the text circled in red.

Information

- General
- Details
- Preferences
- Notes & Activities

Related

- Common
 - PowerOneView**
 - Activities
 - Closed Activities
 - Connections
 - Documents
 - Audit History
- Sales
 - Competitors
- Marketing
 - Marketing Lists
 - Campaigns
- Processes
 - Workflows
 - Dialog Sessions

Lead: Roger Happy

Leads

PowerOneView: Type Status

Search on records

Filter Activities Created On: All OR Modified On: All Include: Related "Child" Records

Type	Regarding	Name	Detail
Campaign...	Web Site -...	Downloaded Demo	Web Site - Download Demo
Campaign...	BIG Event	Attended Big Event	BIG Event
Campaign...	BIG Event	Attended Big Event	BIG Event
Campaign...	BIG Event	Attended Big Event	BIG Event
Campaign...	BIG Event	Attended Big Event	BIG Event
Campaign...	Web Site -...	Downloaded Demo	Web Site - Download Demo
E-mail	Roger Happy	Follow-up on Interest...	Gretchen Opferkew
Appointment	Roger Happy	Met with Roger about...	Gretchen Opferkew
Phone Call	Roger Happy	Discussed Interest	Gretchen Opferkew
Note		Note created on 12/5/2011...	
Note		Note created on 12/5/2011...	This is my note.

1 - 30 of 30

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Status Open

Note created on 12/5/2011 12:21 PM by Gretchen Opferkew

This is my note.

When to Convert

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

OR

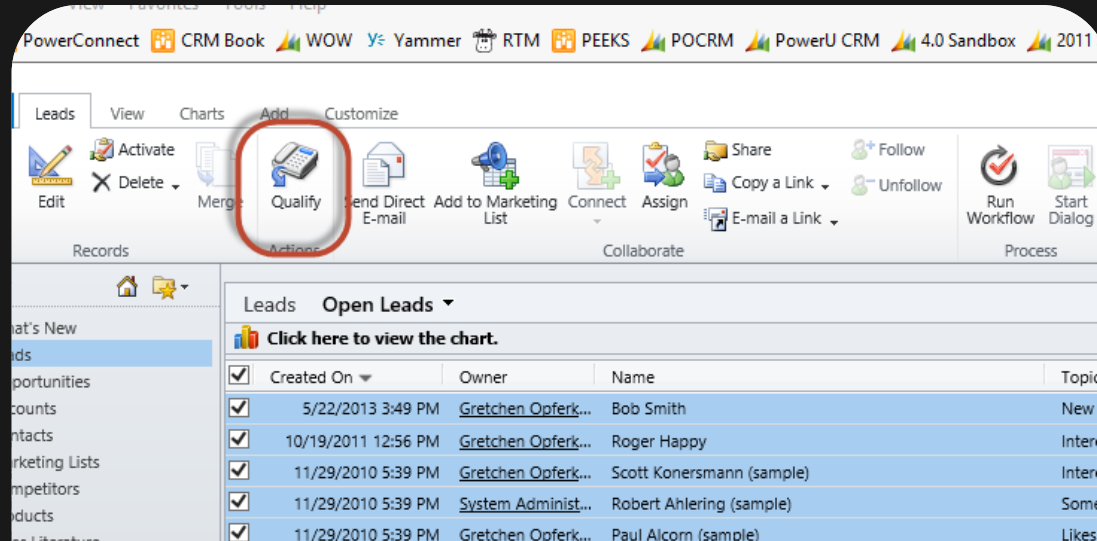
- There is a fit and you want to build a relationship

A screenshot of a CRM lead record for "Scott Konersmann (sample)". The record shows contact information including "Company Name" (Specialty Stores), "Business Phone" (928-228-2827), and "Last Contacted" (1/16/2013). The "Quick Note" section is selected, showing a note with the text: "Talked to Scott and he said he is not the person handling this project. Terry is, but he is not sure w they are at in the decision-making process. Scott took my number and will have Terry call me." Two red circles are drawn around the words "Phone Call" in the note type selector and "Terry" in the note text.

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?



Microsoft Dynamics CRM Upcoming Events

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

Thank You!!

Minneapolis, MN

@CRMGretchen

gretchen@powerobjects.com

Director of Education



Gretchen