



## Sales Rep Guide for Lead-Xpress

Depending upon the way your LeadMaster administrator has configured Lead-Xpress, you will receive an email with a request to update your accounts / records / leads with either

- A web form embedded within the email or
- A link to a web form

Either of these methods will allow you to update your account / record / lead in the LeadMaster Lead Management CRM System.

The web form is customizable and can be as long or as short as needed to capture the desired information from the sales team.

This document provides a short explanation of both.

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## Working with the Request to Update Records Email

Here's an example of the Request to Update Records email:

Dear Dan,

You have a new lead or a request to update an existing opportunity. Please [click here](#) to update the status of this record.

Please fill out all of the information below and then update. We will send you update requests as the sales cycle proceeds. Please call me directly if you have any questions... Your Sales Manager 212-555-1212

Primary Contact Info - Stephen Tantillo	
<b>Name</b> Stephen Tantillo	<b>Sales Manager</b> Paul Race - Atlantic
<b>Title</b> Network Administrator	<b>Sales Rep</b> Dan Hall
<b>Company</b> Synergistic Networks Inc	<b>Partner</b> Joan Walters - Advanced Systems
<b>Address 1</b> 61 Carthage Point Rd	<b>Partner Rep</b> Andy Brownell
<b>Address 2</b>	<b>Campaign</b> Webinar - New Product
<b>Address 3</b>	<b>Phone</b> 202-799-9000
<b>City</b> Natchez	<b>Cell Phone</b>
<b>State</b> DC	<b>800 #</b>
<b>Zip</b> 20037	<b>Fax Number</b> 202-993-0460
<b>Country</b> USA	<b>Company Revenue</b> \$460,400,000.00
<b>Web Address</b> www.sybase.com	<b>Employee Size</b> 1,000
<b>Parent Company</b>	<b>Unique ID</b>

Click Actions		
<input type="checkbox"/> Send Intro Email & Whitepaper	<input type="checkbox"/> Send Email, Call Back in 1 Week	<input checked="" type="checkbox"/> Schedule Demo
<input type="checkbox"/> No Answer	<input type="checkbox"/> Transferred to another position	<input checked="" type="checkbox"/> Add to Seen Demo Nurturing
<input type="checkbox"/> Closed Won	<input type="checkbox"/> Closed Lost	<input checked="" type="checkbox"/> Claim This Account
<input type="checkbox"/> Opt Out		

Profile Summary	
<b>Lead Progress</b> <input type="text" value="QUALIFIED"/>	<b>Lead Status</b> <input type="text" value="WARM"/>
<b>Lead Value</b> <input type="text" value="\$150,000.00"/>	<b>Lead Source</b> <input type="text" value="Referral"/>
<b>Sales Stage</b> <input type="text" value="QUALIFIED / APPT SCHEDULED (20%)"/>	<b>Marketing Mix</b> <input type="text"/>
<b>Forecast Date</b> <input type="text" value="January 2011"/>	
<b>Close Date</b> <input type="text"/>	

The embedded form is compatible with most email clients.

- For many email clients, such as Gmail, Yahoo, etc., you can update the record directly from within the email. Just fill in the appropriate fields and click **Submit**.
- If your email client does not properly display the embedded form, *click on the link* (circled in red) to update the record.
- Please note – once you have updated the record, the email may no longer accurately reflect the data in the LeadMaster system. For example, if you update the lead status from “Warm” to “Hot”, your email will still show “Warm”. You should click on the link to see the current data for the record after the initial update.



## Completing the Web Form:

This form is customizable. You can decide not only which sections you want to include or exclude, but you can also customize many of the individual items inside the sections.

- **Contact Info** – Provides basic company and contact info.
- **Click Action Check Boxes** – By checking the box that corresponds with your update, the system will log, date and time stamp the information. This is the fastest and easiest way to update your records. All of these checkboxes are user-definable.
  - Please note that checking some boxes will result in corresponding actions that are programmed through LeadMaster's Automation and Workflow Management feature.
    - Send Intro Email and Whitepaper
    - Add to Lead Nurturing, etc.
- **Profile Summary** – These are user-definable fields. As shown here they help track both the status of the lead and once an opportunity is identified, the sales stage.

Because most of these fields include a list of choices, they provide a consistent way of tracking and measuring performance.

These fields are tied into reporting and charting so that progress is easily tracked on the LeadMaster dashboards.

When you've completed a sales call simply update the account using one or more of these fields.



- **Custom Forms** - In addition to the standard LeadMaster sections (Contact Info, Click Actions, Profile Summary etc.), the LeadMaster administrator can also include fields and forms of your own design.

Sales Form				
X-Dates				
Auto X Date	WC X Date	Pkg X Date	Financial Services	Group X Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Auto Carrier	WC Carrier	Pkg Carrier	Misc Carrier	Group Carrier
<input type="text" value="-Please Select-"/>	<input type="text" value="-Please Select-"/>	<input type="text" value="-Please Select-"/>	<input type="text" value="-Please Select-"/>	<input type="text" value="-Please Select-"/>
Other Auto Carrier:	Other WC Carrier:	Other Pkg Carrier:	Other Misc Carrier:	Other Group Carrier:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Info				
Commercial Agency	Benefit Agency	Years w/ Commercial Agency	Years w/ Benefits Agency	
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	
Telemarketing Distribution				
Interested in:	Marital Status	Location	Age Bracket	
<input type="checkbox"/> Health <input type="checkbox"/> Life <input type="checkbox"/> Auto <input type="checkbox"/> Disability <input type="checkbox"/> Workmans Comp <input type="checkbox"/> Liability <input type="checkbox"/> Business	<input type="text" value="--- Please Select ---"/>	<input type="radio"/> Urban Upscale <input type="radio"/> Urban Stable <input type="radio"/> Urban in Transition <input type="radio"/> Rural Upscale <input type="radio"/> Rural In Transition <input type="radio"/> Rural Stable	<input type="radio"/> Under 30 <input type="radio"/> 30 to 50 <input type="radio"/> 50 to 65 <input type="radio"/> Over 65	
Custom Survey/Lead Feedback				
Did you follow-up with this lead? <input type="radio"/> Yes <input type="radio"/> No				
Was the primary contact reached? <input type="radio"/> Yes <input type="radio"/> No				
What was the general response? <input type="radio"/> Positive <input type="radio"/> Negative				

Above are 4 examples of sections that can be designed by the LeadMaster administrator. These examples are related to the insurance industry.

- The first section contains expiration dates.
- The second section contains data about agencies.
- The third section contains customer survey data that may have come from a telemarketing program.
- The fourth section contains a survey for the sales rep on the quality of the lead.



All of these sections are designed to illustrate how an insurance company might use Lead-Xpress. This form could have just as easily been designed for any industry.

- **Sales Rep Comment/Notes** – This section provides a place to record interactions with the customer.

Sales Rep Comments/Notes
<div style="border: 1px solid black; height: 30px; width: 100%;"></div> <p>1-Dec-2010 4:18 PM EST - Andy Brownell Sales Manager - Sales Rep: Reassignment from Don Hall to Dan Hall</p>

All of the previous comments can be displayed in both the email and the web form.