Exploring Lead Management in Marketing Center

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What is the purpose of this guide?

Welcome to Marketing Center! This guide is designed to help you start using the most common features and tools available within the Lead Management area of the platform.

Use this guide **on-the-job**, to aid you as you work through a variety of tasks. Upon completion of the guide, you will be able to do the following:

- Navigate the Lead Management area of the platform
- Access and manage your leads
- Convert leads to opportunities
- Access and manage your opportunities
- Identify setting options

On the next slide, you find a series of topics. Click on each icon to access a topic. In most cases, you find a number after the slide heading. This indicates the number of slides associated with the topic you are reviewing and the slide you are on. For example, 1/3 tells me I'm on the first of three slides.

Agenda

Click on the icon to launch each topic.

What is a lead?

How do I access my leads?

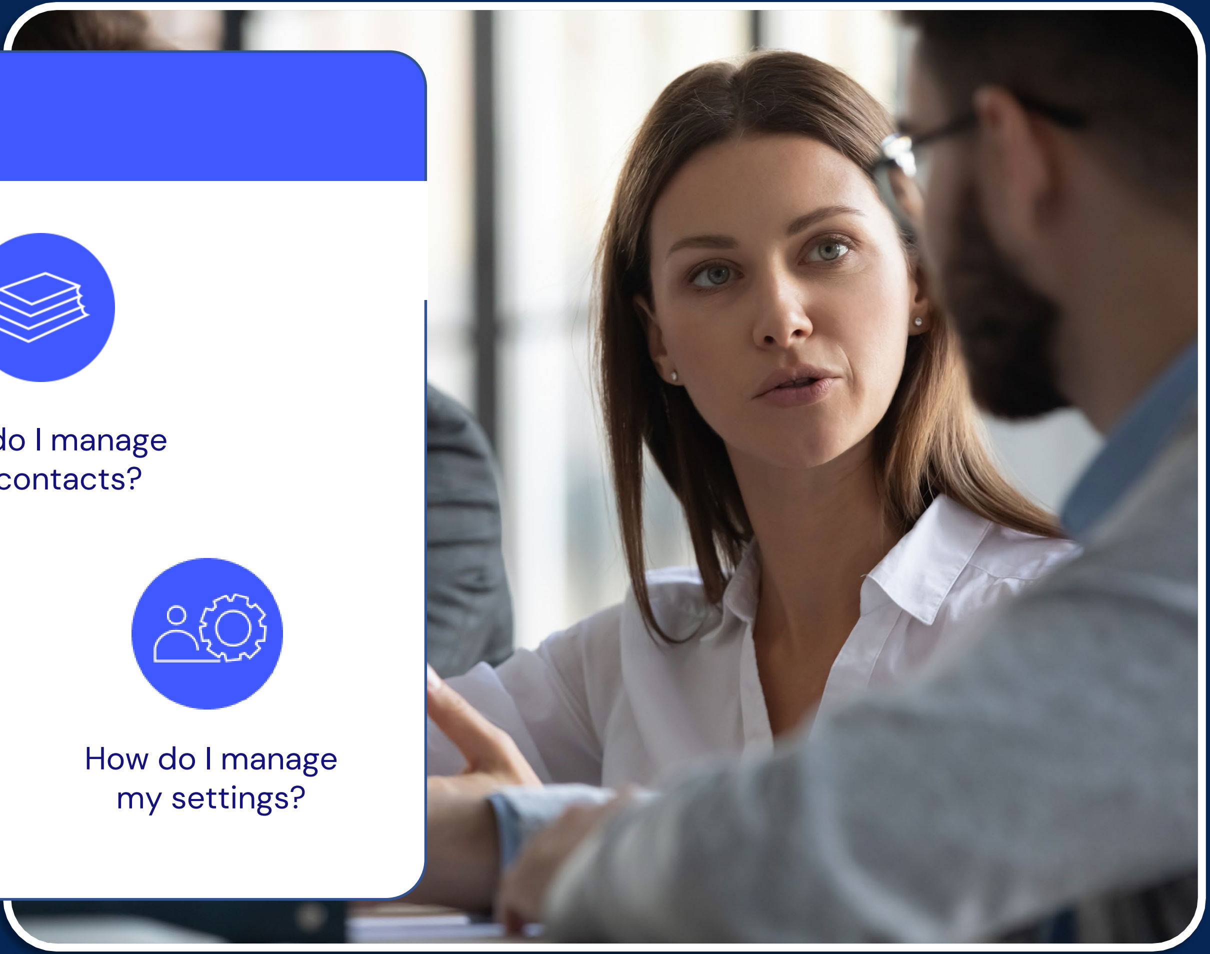
How do I manage my contacts?

How do I manage my leads

How do I move a lead to an opportunity?

How do I manage my opportunities?

How do I manage my settings?



What is a lead?

Main Menu

In general, a lead is any individual that expresses interest in what you are selling.

When it comes to **Marketing Center**, a lead is any prospect who interacts with an email, banner ad, or social post, and fills out an associated form.

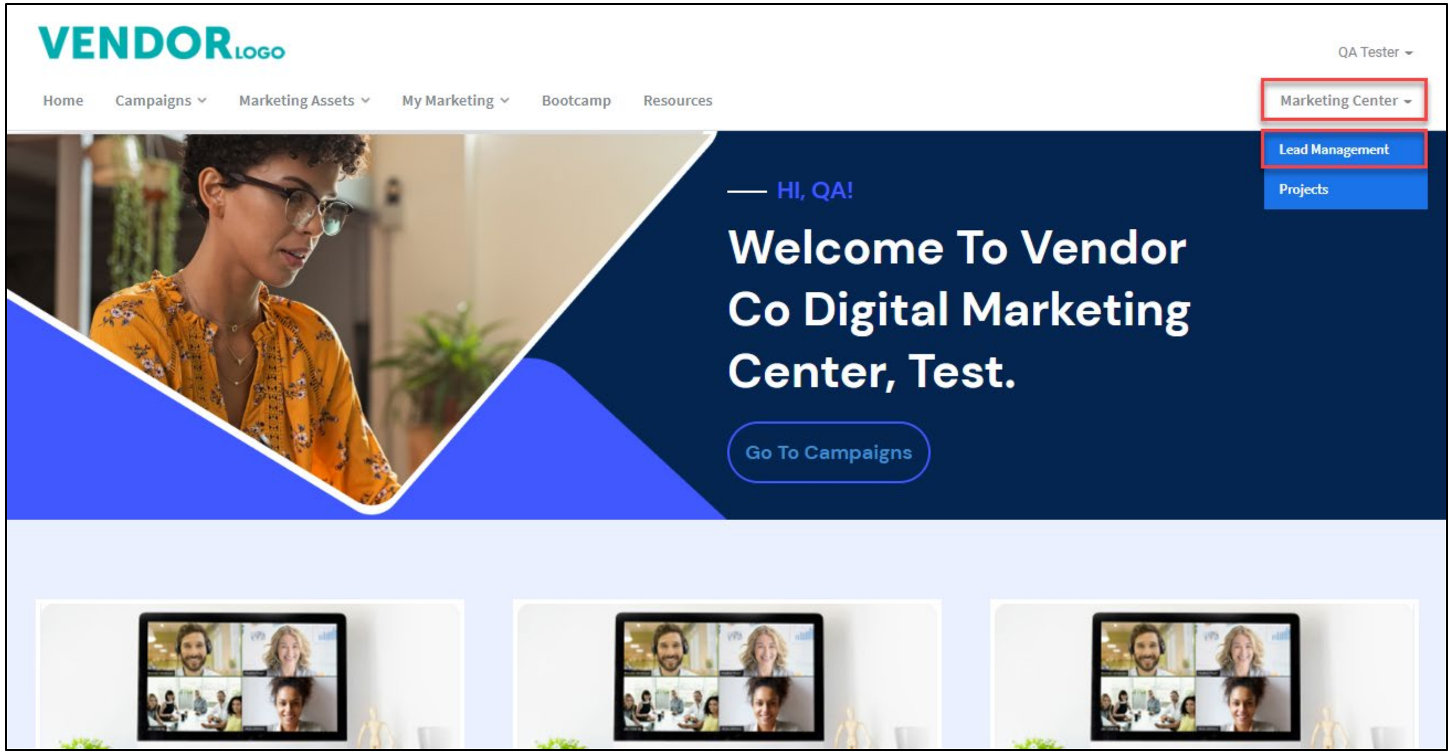
Once a prospect becomes a lead, use the platform to:

- Manage and track their lead stage
- Keep records of all interactions
- Assign them to the appropriate rep
- Once qualified, move them to opportunities and win the business!

How do I access my leads (1/3)?

Once a prospect completes a form, they automatically generate as leads within the Lead Management area of the platform.

To access Lead Management, on the upper right side of the page, from the **drop-down menu**, select **Lead Management.**

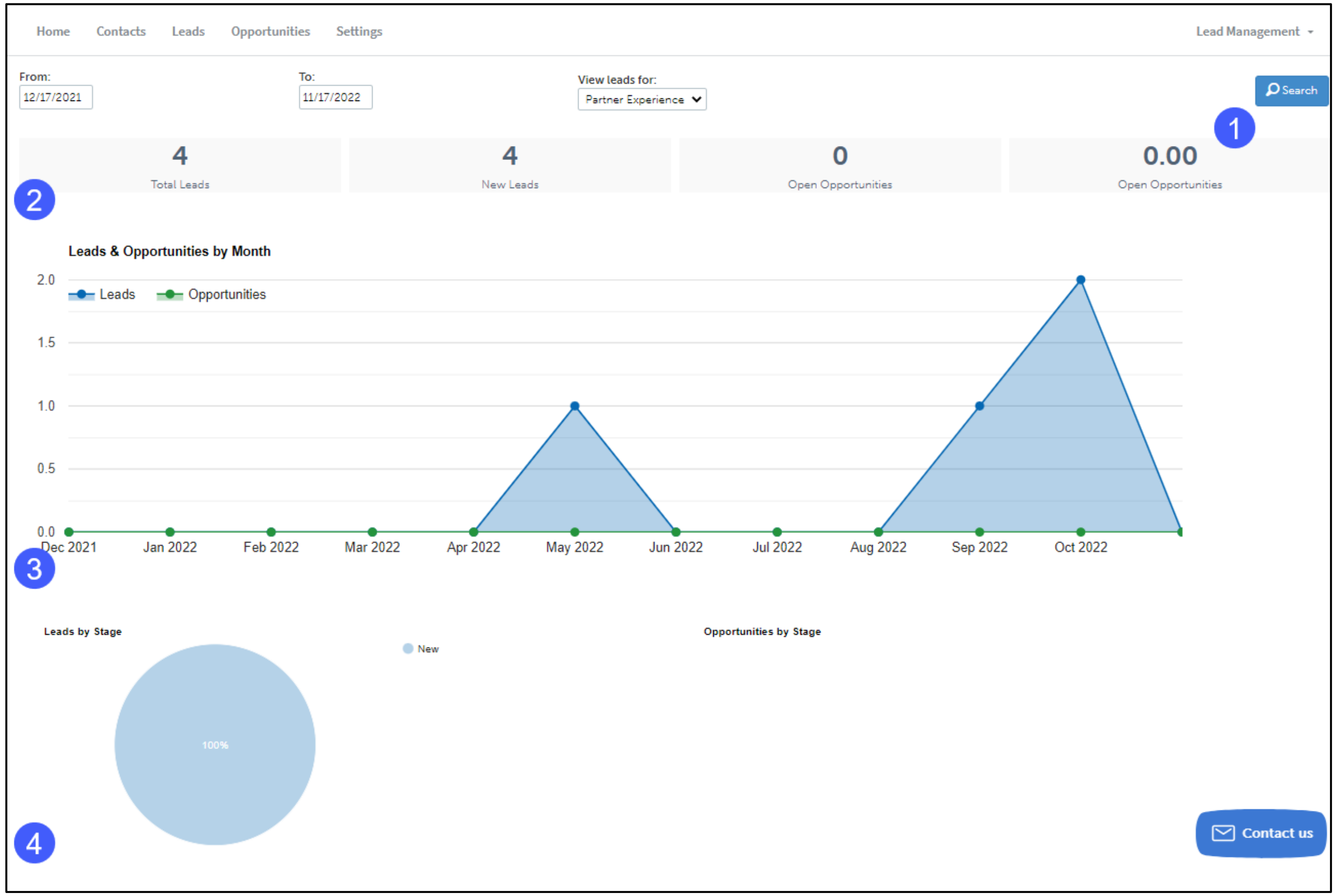


How do I access my leads (2/3)?

Main Menu

Upon entering lead management, you land on the Home page. Here you find a dashboard that provides a high-level overview of your lead management activities, including:

1. **Search bar** to search for lead information by date or assigned user.
2. **Information panel** to review high- level leads & opportunity stats.
3. **Line chart** that details leads & opportunities by month.
4. **Bar chart** that details leads & opportunities by stage.



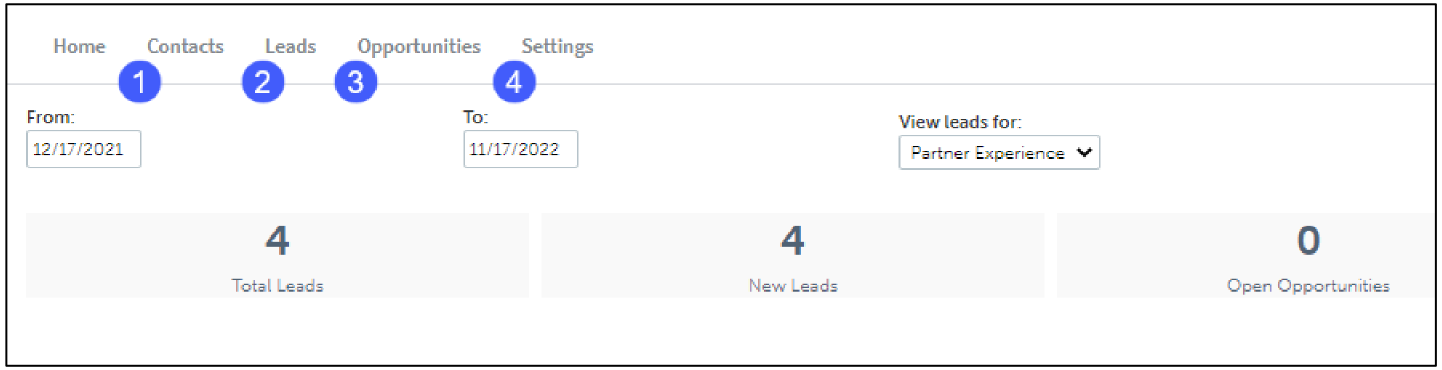
How do I access my leads (3/3)?

Main Menu

Leads are managed in different ways, depending on where they fall within the sales funnel. Leads are organized within the following pages:

1. Contacts
2. Leads
3. Opportunities
4. Settings (this page allows you to customize options within the leads & opportunity pages)

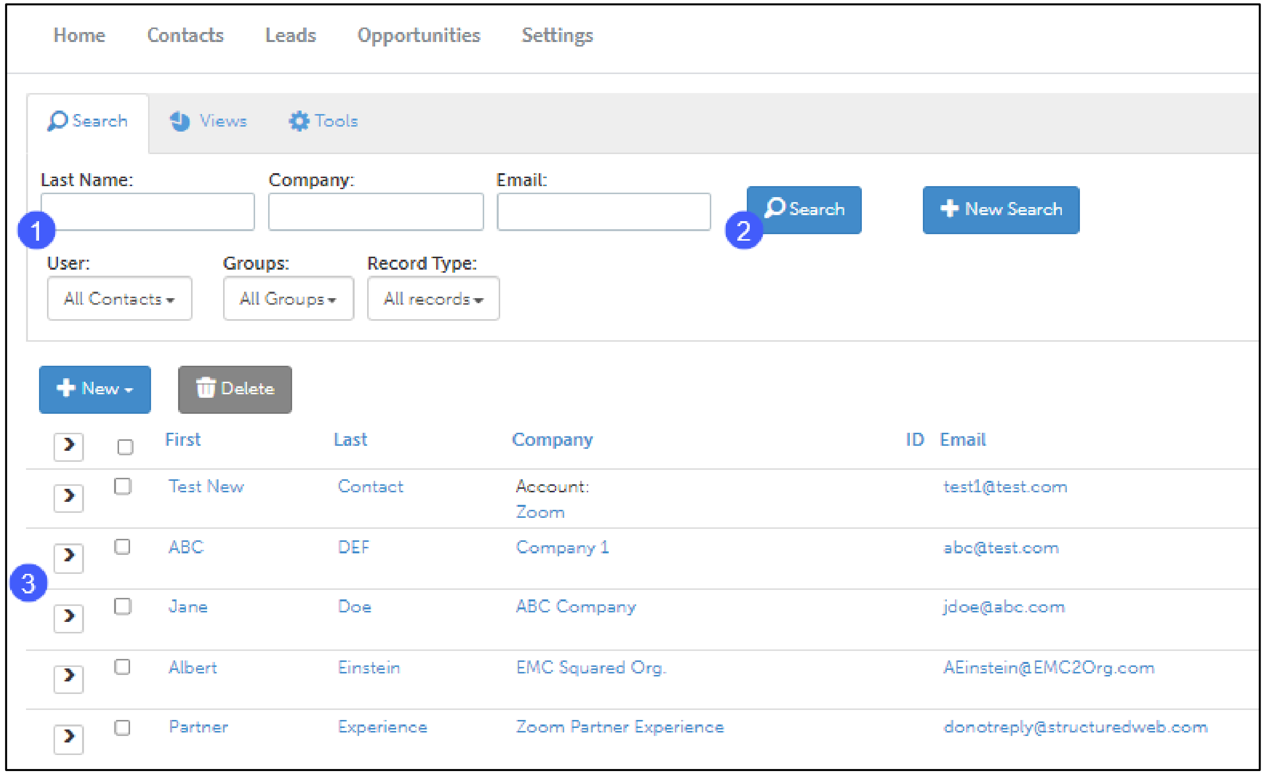
Review the following slides to learn about key tasks you can accomplish within each page.



What do I do in the Contacts page (1/2)?

The Contacts page is where you manage your lead's information. Here, search for leads, and find relevant information, such as their demographic details, touchpoint records, campaigns viewed, etc.

1. Enter **Last Name**, **Company**, or **Email** address to search for individual contacts.
2. Click **Search** to view all contacts at once.
3. View & select **contacts** here.

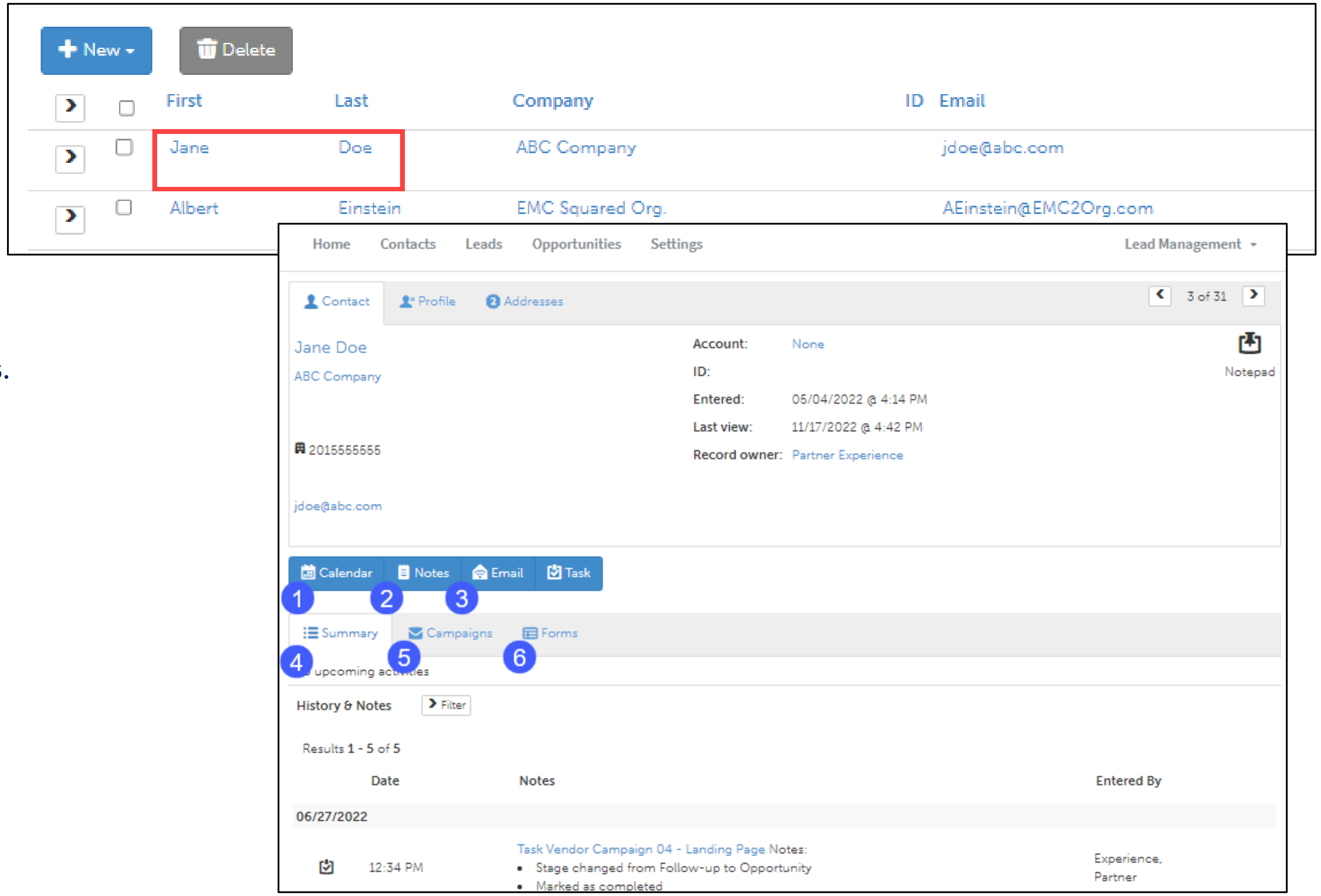


What do I do in the Contacts page (2/2)?

Click in the **cell** within the **First** or **Last** columns to access a prospect's record.

Use the **toolbar** or **tabs** to add :

1. **Calendar:** Record follow-up appointments and other critical date reminders.
2. **Notes:** Keep accurate records of lead interactions.
3. **Emails:** Reach out to your lead, directly from the platform.
4. **Summary:** Review history & notes related to the lead.
5. **Campaign:** Identify the campaign related to the lead.
6. **Form:** Review the fields the lead completed.

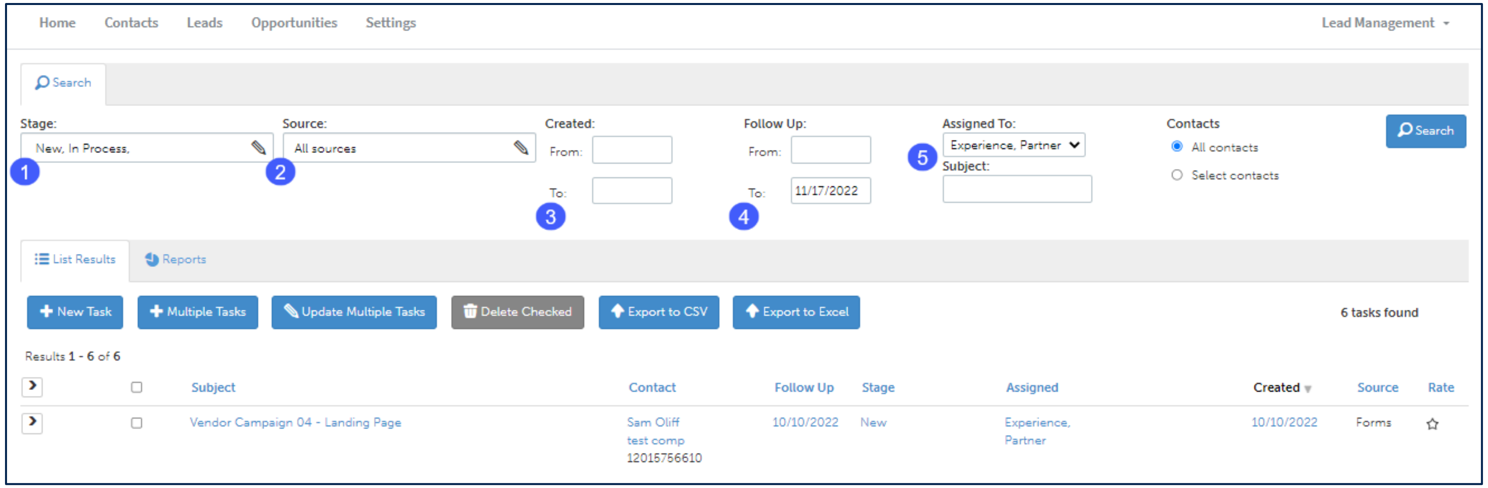


What do I do in the Leads page (1/4)?

The Leads page allows you to filter leads based on categories, such as the stage the lead falls within the sales funnel, the expected follow-up date, the assigned representative, and more.

Categories are defined as follows:

1. **Stage:** Funnel stage your lead currently falls.
2. **Source:** Currently forms are the only available source.
3. **Created:** Date the lead completed the form.
4. **Follow-up:** Date assigned for follow-up.
5. **Assigned to:** User assigned to the lead. Once assigned, the user will receive an email alerting them that they've been assigned to the lead.



Note: You can add more than one category to a single search. Click **Search** once all categories are selected.

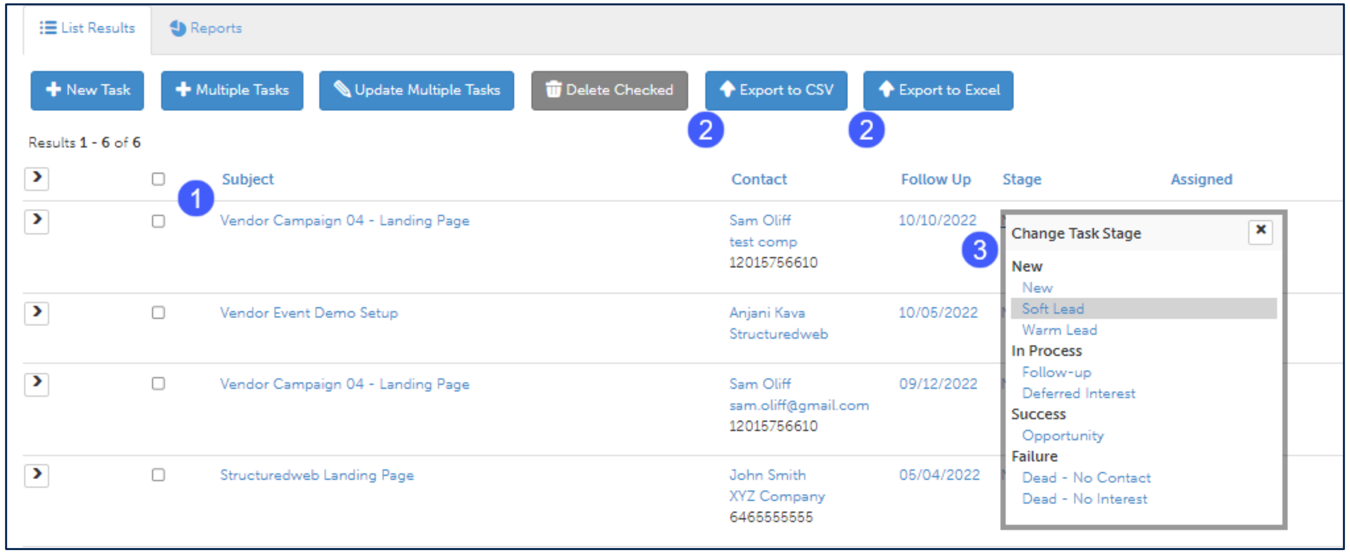
What do I do in the Leads page (2/4)?

Main Menu

After you filter by category, leads appear in **List Results** grid on the bottom of the page.

Manage this grid as follows:

1. Click on any **column header** to sort by the column. (By default, leads are listed by Created Date.)
2. Use the **buttons** to export your leads to **Excel or CSV**. From there, upload leads to your preferred CRM.
3. Click inside any **cell** to update the **category**. (Note the the column headers reflect the filter options above.)



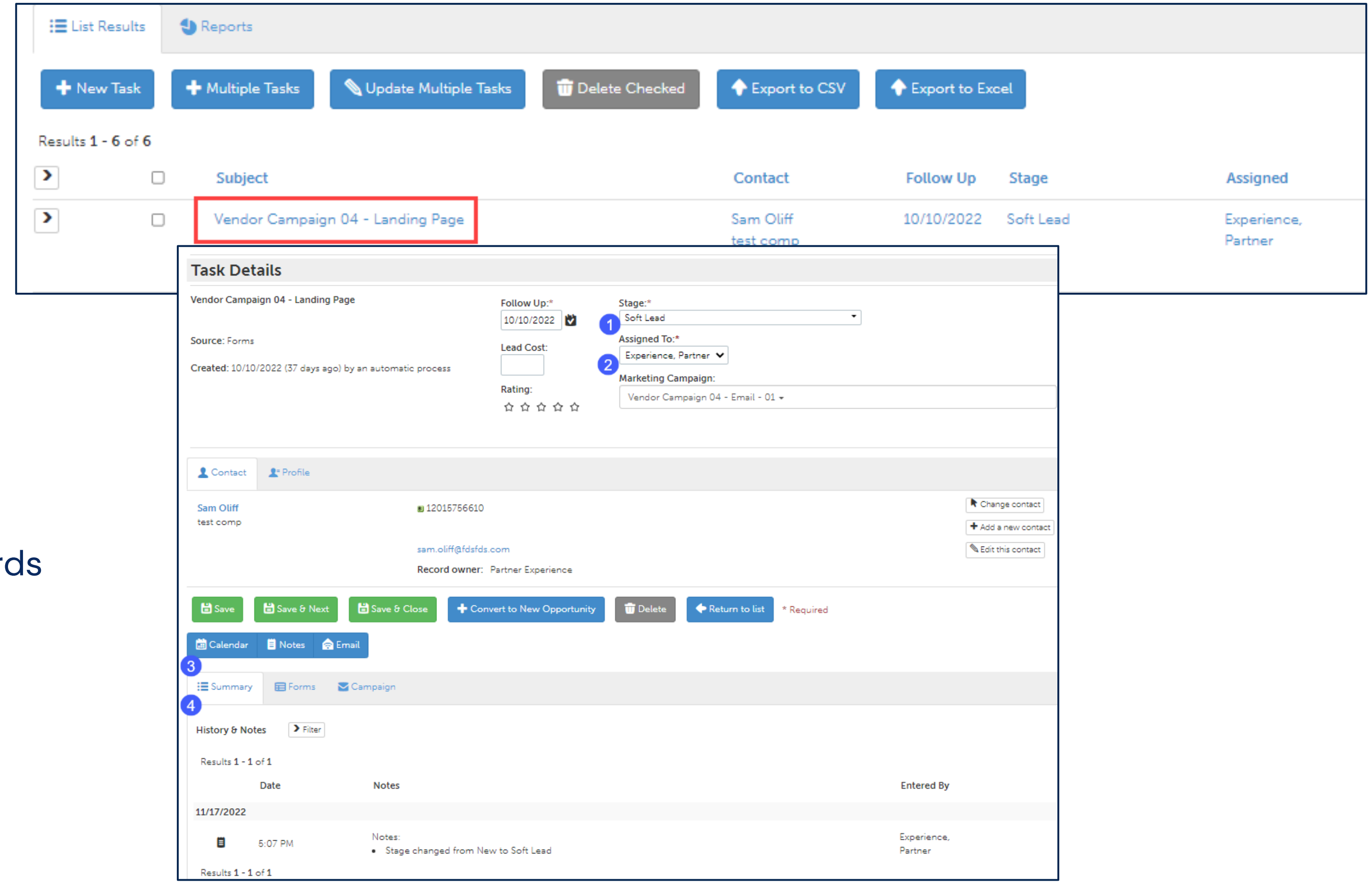
Note: In this example, the stage category is updated from **New** to **Soft Lead.**

What do I do in the Leads page (3/4)?

Click in the **cell** within the **Subject** column to access a **lead record.** (Note: If you click in Contacts, you are redirected to the Contacts page.)

Use these fields to manage the lead:

1. From the **Stage** drop-down, select the **appropriate stage** as the lead continues down the funnel.
2. From the **Assigned to** drop-down menu, select the **correct rep** to follow up at the assigned stage.
3. Use the **toolbar** to enter calendar dates, keep records and email leads directly from the platform.
4. Use the **tabs** to review:
   a. **Summary:** History & notes related to the lead
   b. **Form:** fields the lead completed.
   c. **Campaign:** The content syndication campaign from which the form was available.



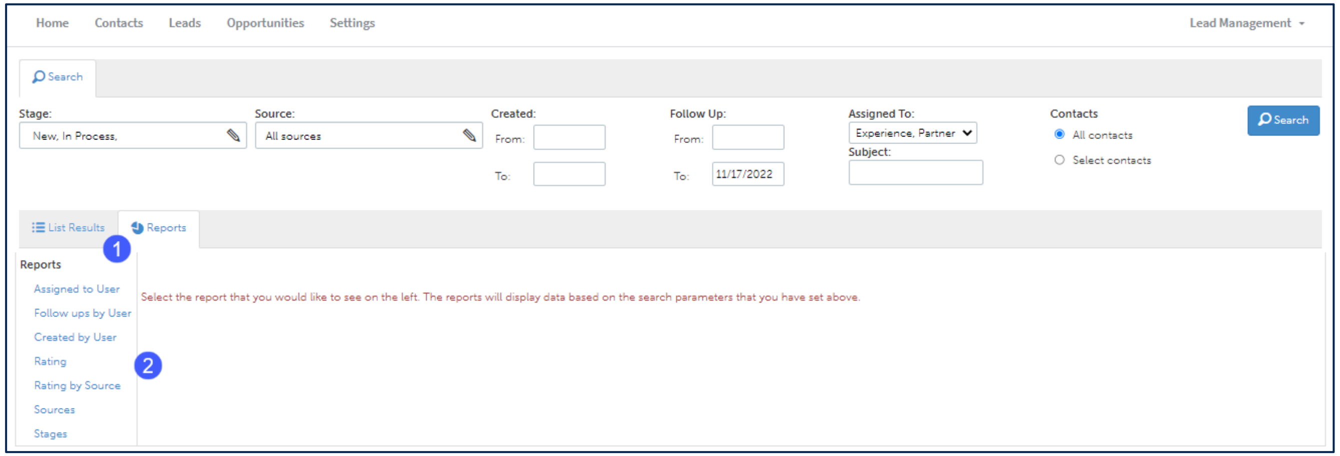
Note: Notice in this example the platform automatically recorded that the lead was moved from **New** to **Soft Lead**.

What do I do in the Leads page (4/4)?

Next to the List Results tab, you find Reports. Here, you find a variety of reports to view lead data for the previous four months. These reports aggregate lead activity across all your active campaigns.

Do the following:

1. From the tabs on the bottom half of the page, select **Reports**.
2. On the left side of the page, click on the **report** you want to view. (Note: These reports are static.)

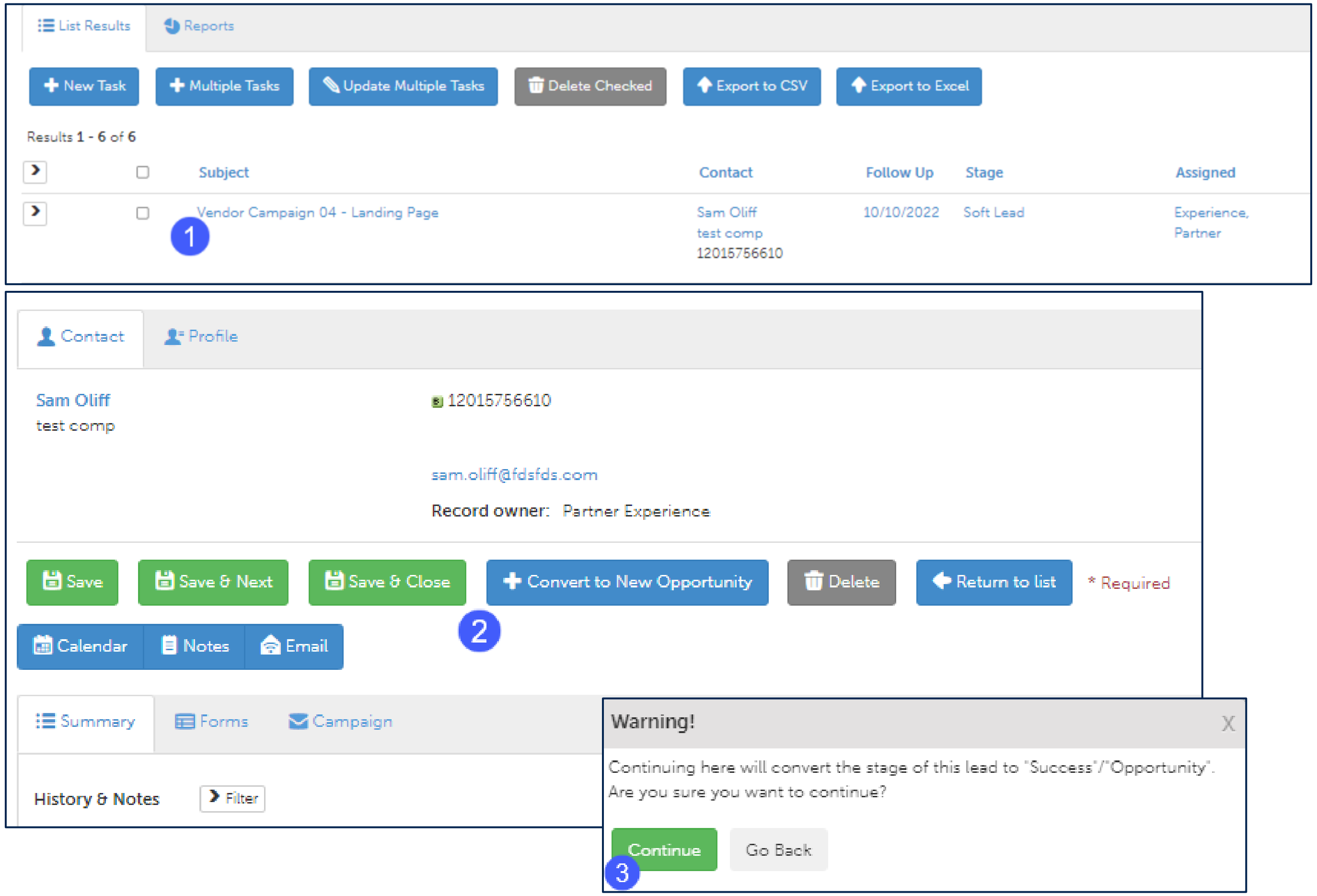


How do I move a lead to an opportunity (1/2)?

Once leads are qualified, they can be moved to the Opportunity pages. By moving them to opportunities, you identify them as potential customers and add them to your sales pipeline.

Do the following:

1. From the **List Results** tab, In the **Subject** column, click on the **lead** you want to move.
2. In the **Contact** area, click **Convert to New Opportunity**. A box opens.
3. Click **Continue.**

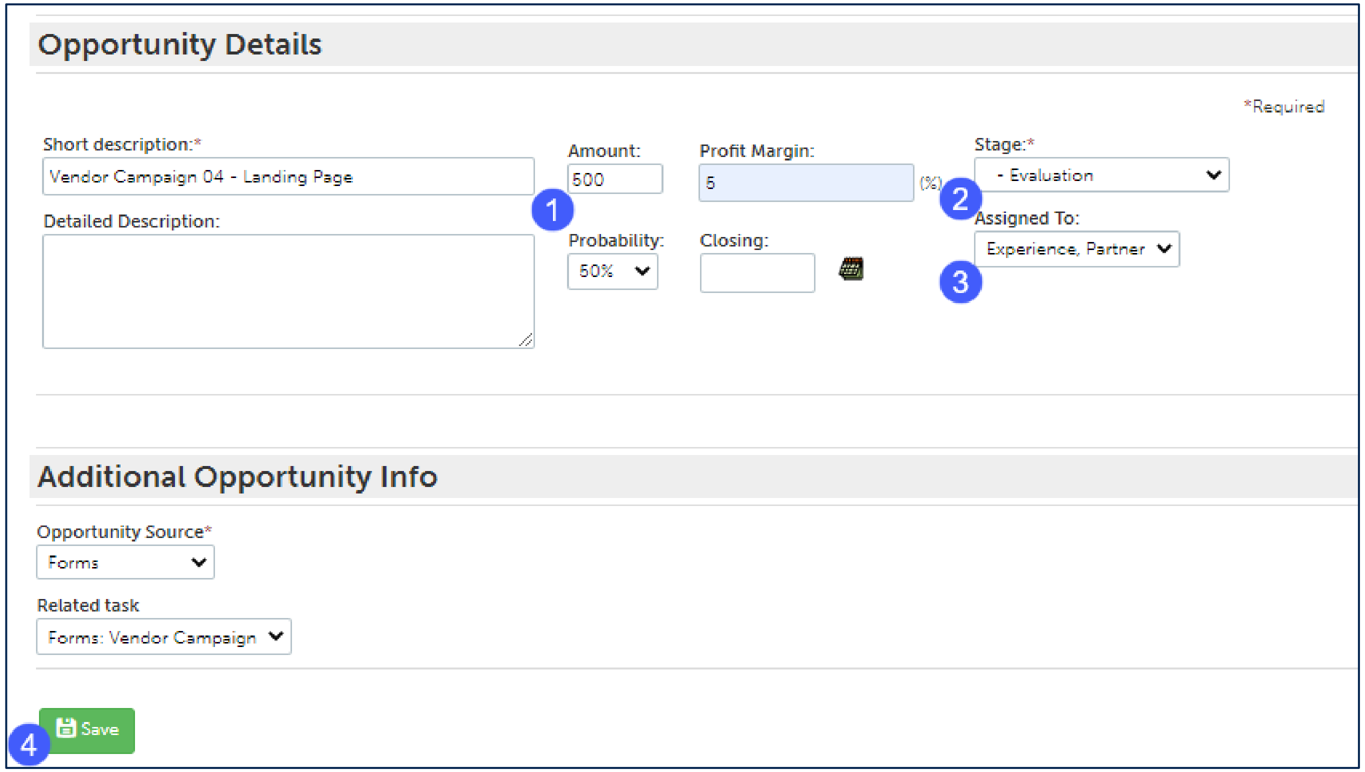


How do I move a lead to an opportunity (2/2)?

From the Opportunity Details page, enter relevant information, such as monetary value, potential time frame, and the product the opportunity is interested in purchasing.

Do the following:

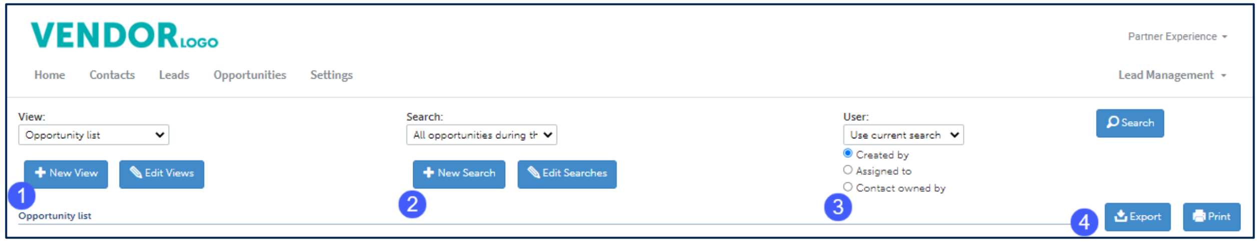
1. Enter the **appropriate** details.
2. From the **stage** drop-down menu, select the **appropriate** stage within the sales process
3. From the **Assigned** To drop-down menu, select the **sales rep** to assign the opportunity to.
4. Click **Save**.



What do I do within the Opportunities page (1/2)?

At the top of the Opportunities page, you find several categories to review your potential opportunities:

1. Use the **View** drop-down menu to generate a **static list** of opportunities. Or click **New View** to create a view containing custom fields and **Edit View** to edit an existing one.
2. Use the **Search** drop-down menu to generate a **dynamic list** based on a set of criteria. Or click **New Search** to create a new search based on criteria and **Edit Search** to edit an existing one.
3. Use the **User** drop-down menu to search for all opportunities assigned to a **specific user**.
4. Click **Export** to export to a **CSV file**. Once exported, upload the file to your preferred CRM tool.

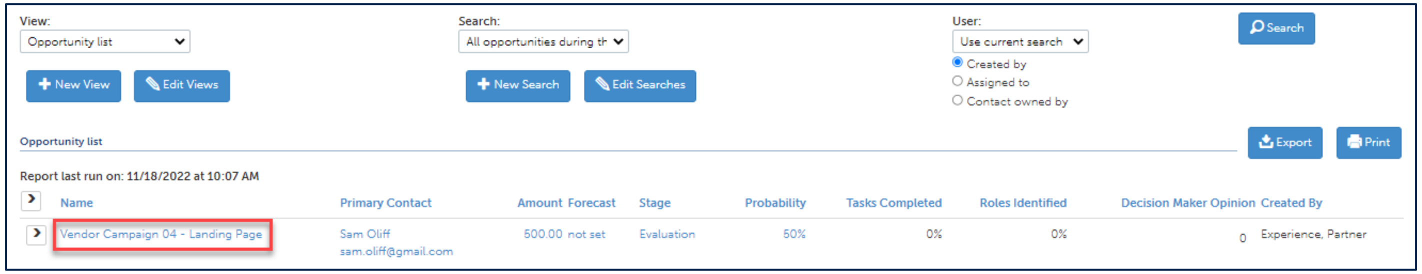


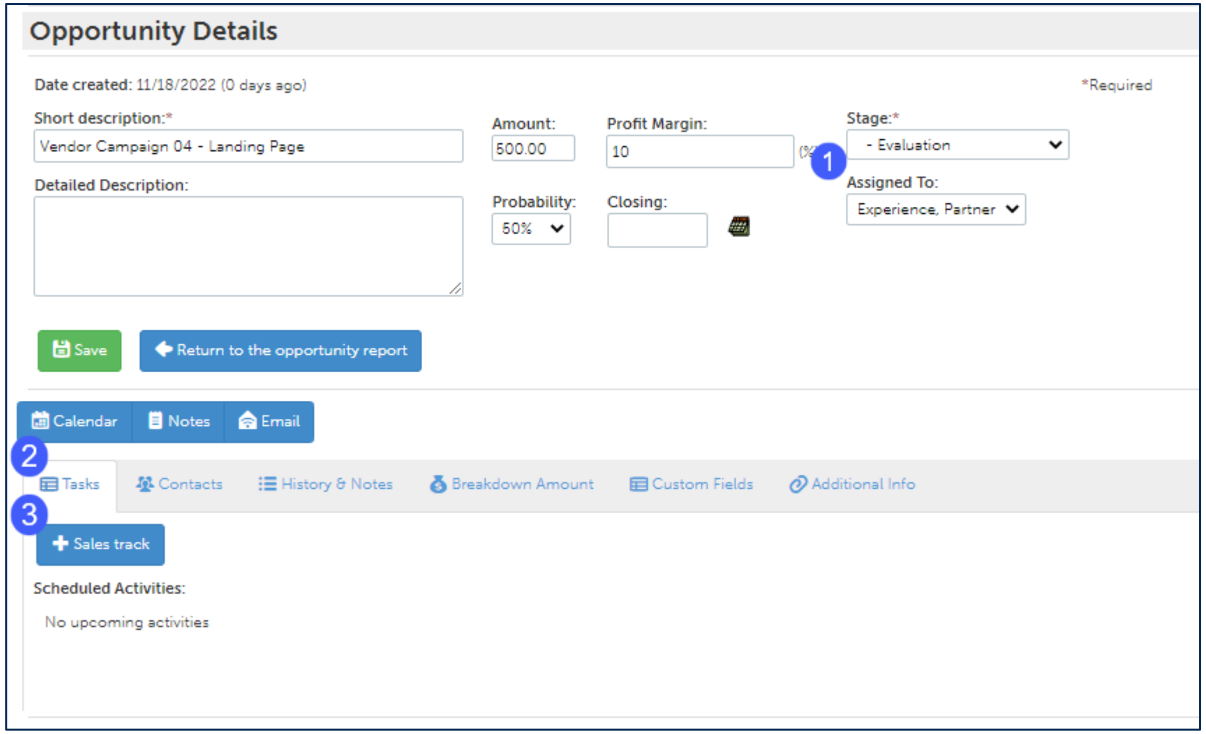
Note: You can add more than one category to a single search. Click **Search** once all categories are selected.

What do I do within the Opportunities page (2/2)?

Under the Opportunity list area, click in the **cell** in the **Name** column to access an opportunity's record. (Note: If you click on Contacts, you are redirected to the contacts' page.)

1. Click the **Stage** drop-down to change your opportunity's stage.
2. Use the **toolbar** to enter calendar dates, keep records and email the opportunity directly from the platform.
3. Use the **tabs** to review:
   a. Contact details or to add additional contacts
   b. Review the history and any previously created notes.
   c. Potential amount assigned to the opportunity



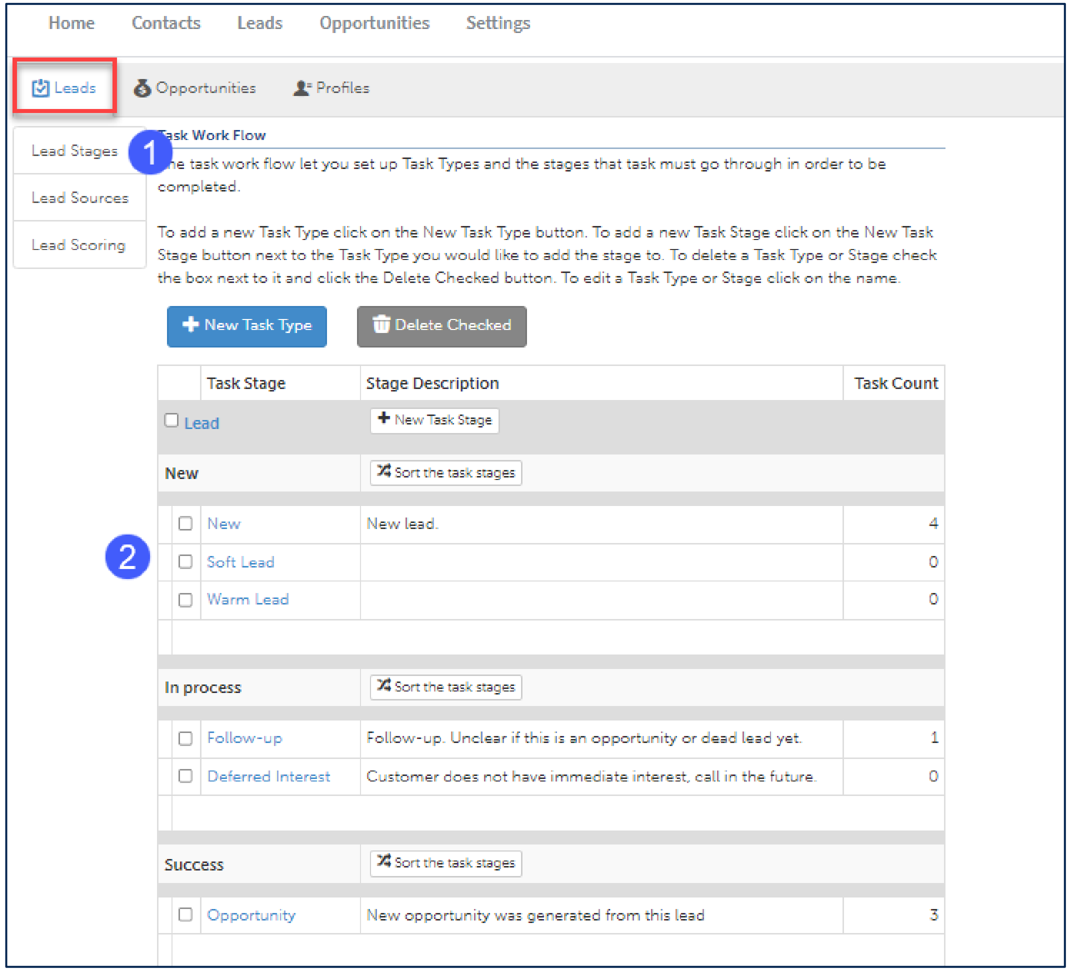


What do I do within the Settings page(1/2)?

The Settings page allows you to customize Lead Management to better match the sales process within your organization.

After clicking on Settings, you find several tabs, beginning with **Leads**. This tab allows you to:

1. Create or edit **lead stages**.
2. Assign or edit **points** to better manage **lead scoring.**



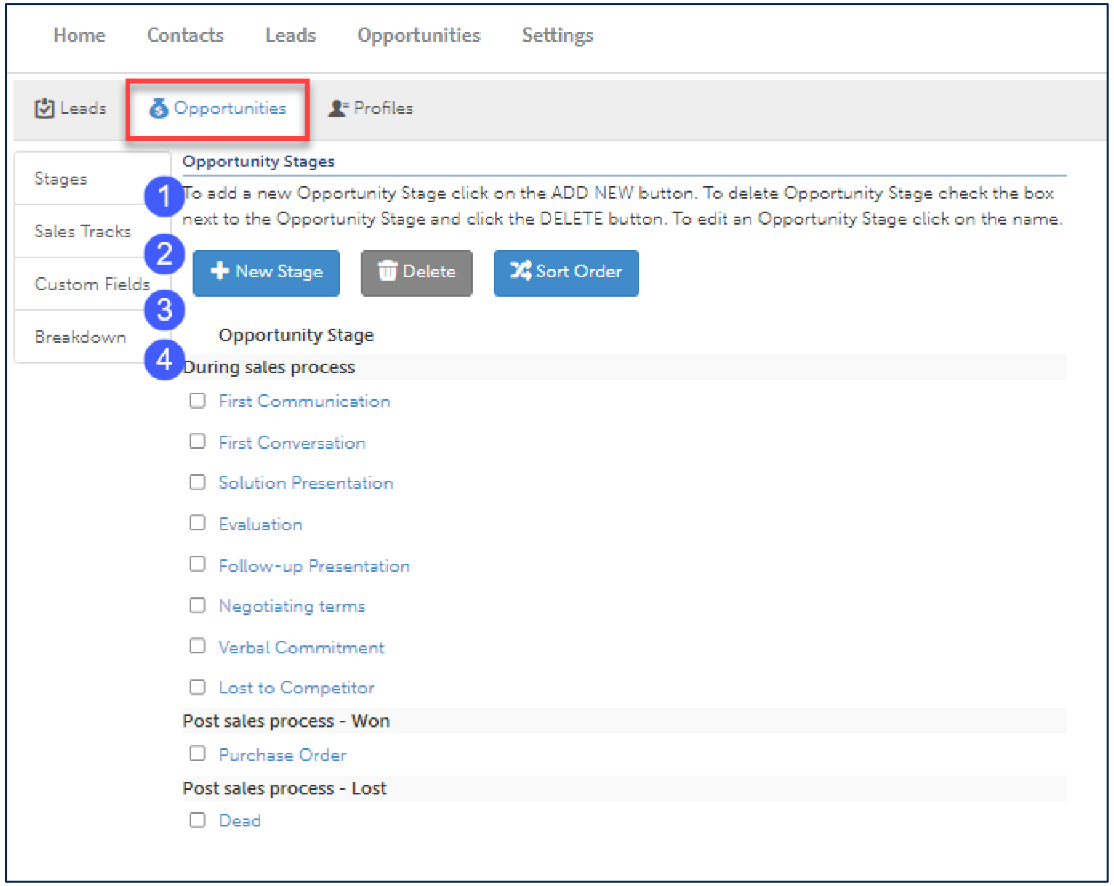
What do I do within the Settings page (2/2)?

Main Menu

In the Opportunities tab, you can:

1. Create **custom opportunity stages.**
2. Create a **customized sales track** based upon the potential sales type.
3. Create **custom opportunity fields** to fit a specific business need
4. Add a **breakdown of the amount** to be generated by the potential sale.

Any settings created will automatically update throughout the Lead Management area of the platform.



Thank You!