



— HI, QA!

Welcome To Vendor Co Digital Marketing Center, Test.

[Go To Campaigns](#)

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?

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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!

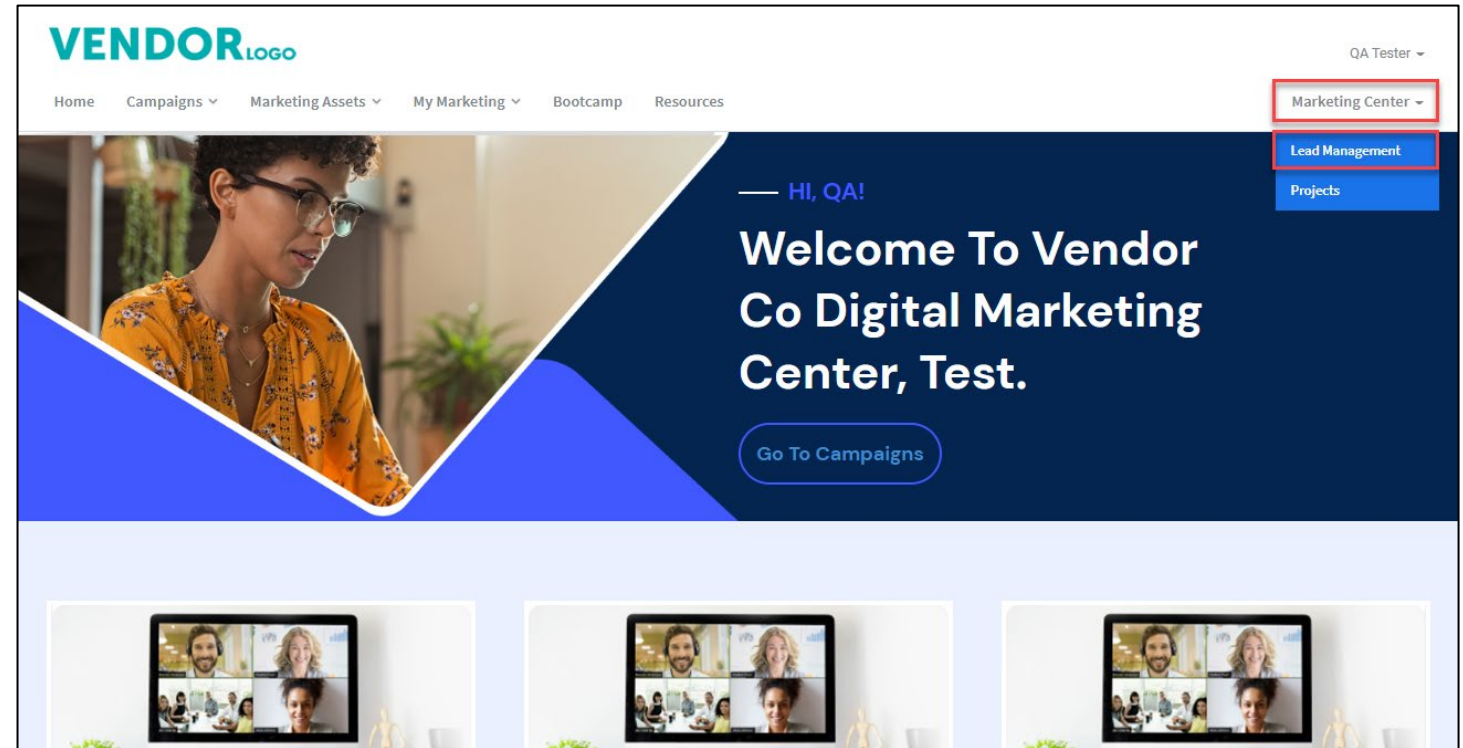


How do I access my leads (1/3)?

Main Menu

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**.

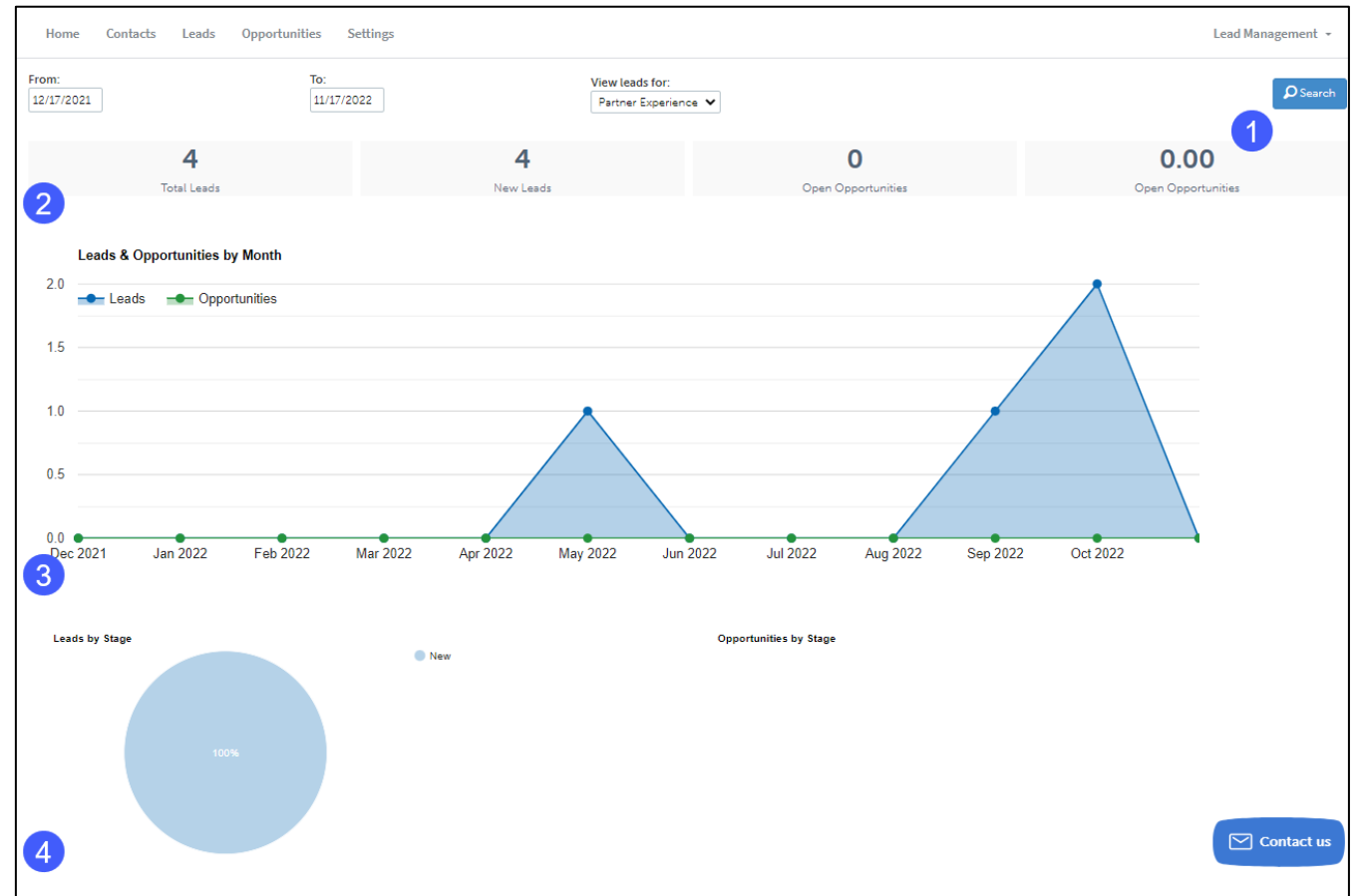


How do I access my leads (2/3)?

[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.



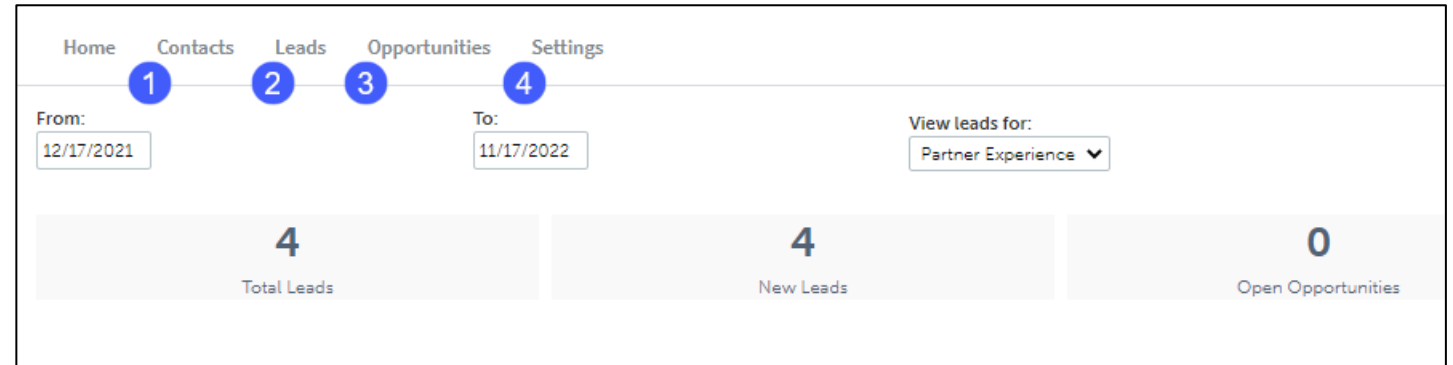
How do I access my leads (3/3)?

[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)?

[Main Menu](#)

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.

HomeContactsLeadsOpportunitiesSettings

SearchViewsTools

Last Name:Company:Email:

1

2

SearchNew Search

User:Groups:Record Type:

All ContactsAll GroupsAll records

+ NewDelete

| | First | Last | Company | ID | Email |
|---|----------|------------|-------------------------|----|------------------------------|
| | Test New | Contact | Account: Zoom | | test1@test.com |
| | ABC | DEF | Company 1 | | abc@test.com |
| 3 | Jane | Doe | ABC Company | | jdoe@abc.com |
| | Albert | Einstein | EMC Squared Org. | | AEinstein@EMC2Org.com |
| | Partner | Experience | Zoom Partner Experience | | donotreply@structuredweb.com |

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

[Main Menu](#)

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.

The screenshot displays the Lead Management interface. At the top, there's a toolbar with '+ New' and 'Delete' buttons. Below it is a table of contacts with columns: First, Last, Company, ID, and Email. The first row shows 'Jane Doe' from 'ABC Company' with email 'jdoe@abc.com'. The 'Jane' and 'Doe' cells in the 'First' and 'Last' columns are highlighted with a red box. Below the table, a detailed view of Jane Doe is shown. It includes tabs for 'Contact', 'Profile', and 'Addresses'. The 'Contact' tab is active, showing Jane Doe's name, company, phone number, and email. To the right, there's a 'Lead Management' dropdown and a 'Notepad' icon. Below the contact info, there's a toolbar with 'Calendar', 'Notes', 'Email', and 'Task' buttons. Below that, there's a 'Summary' tab and a 'Campaigns' tab. The 'Summary' tab is active, showing a list of 'upcoming activities'. Below that, there's a 'History & Notes' section with a 'Filter' button. The 'History & Notes' section shows a list of activities with columns: Date, Notes, and Entered By. The first activity is dated '06/27/2022' and has a note: 'Task Vendor Campaign 04 - Landing Page Notes: Stage changed from Follow-up to Opportunity, Marked as completed'. The 'Entered By' column shows 'Experience, Partner'.

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

[Main Menu](#)

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.

Home Contacts Leads Opportunities Settings Lead Management

Search

Stage: New, In Process. Source: All sources Created: From: To: Follow Up: From: To: 11/17/2022 Assigned To: Experience, Partner Subject: Search

List Results Reports

+ New Task + Multiple Tasks Update Multiple Tasks Delete Checked Export to CSV Export to Excel 6 tasks found

Results 1 - 6 of 6

| | Subject | Contact | Follow Up | Stage | Assigned | Created | Source | Rate |
|--|-----------------------------------|---------------------------------------|------------|-------|------------------------|------------|--------|------|
| | Vendor Campaign 04 - Landing Page | Sam Oliff test comp 12016756610 | 10/10/2022 | New | Experience, Partner | 10/10/2022 | Forms | ☆ |

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.)

The screenshot displays the 'List Results' section of a CRM interface. At the top, there are tabs for 'List Results' and 'Reports'. Below the tabs are several action buttons: '+ New Task', '+ Multiple Tasks', 'Update Multiple Tasks', 'Delete Checked', 'Export to CSV', and 'Export to Excel'. The main area shows a table of leads with columns: Subject, Contact, Follow Up, Stage, and Assigned. The table contains five rows of lead data. A dropdown menu titled 'Change Task Stage' is open, showing a list of stages: New, Soft Lead, Warm Lead, In Process, Follow-up, Deferred Interest, Success, Opportunity, Failure, Dead - No Contact, and Dead - No Interest. The 'Soft Lead' option is highlighted. Numbered callouts (1, 2, 3) indicate the steps described in the text: (1) clicking a column header, (2) clicking export buttons, and (3) clicking a cell to update the category.

| Subject | Contact | Follow Up | Stage | Assigned |
|-----------------------------------|---|------------|------------|----------|
| Vendor Campaign 04 - Landing Page | Sam Oliff test comp 12015756610 | 10/10/2022 | New | |
| Vendor Event Demo Setup | Anjani Kava Structuredweb | 10/05/2022 | Soft Lead | |
| Vendor Campaign 04 - Landing Page | Sam Oliff sam.oliff@gmail.com 12015756610 | 09/12/2022 | Warm Lead | |
| Structuredweb Landing Page | John Smith XYZ Company 6465555555 | 05/04/2022 | In Process | |

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

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

Main Menu

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.

The screenshot displays the 'Leads' page interface. At the top, there are tabs for 'List Results' and 'Reports'. Below these are several action buttons: '+ New Task', '+ Multiple Tasks', 'Update Multiple Tasks', 'Delete Checked', 'Export to CSV', and 'Export to Excel'. A table shows 'Results 1 - 6 of 6'. The first row is a header with columns: 'Subject', 'Contact', 'Follow Up', 'Stage', and 'Assigned'. The second row shows a lead with 'Subject: Vendor Campaign 04 - Landing Page', 'Contact: Sam Oliff', 'Follow Up: 10/10/2022', 'Stage: Soft Lead', and 'Assigned: Experience, Partner'. A red box highlights the 'Subject' cell. Below the table, a 'Task Details' modal is open for the selected lead. It shows fields for 'Follow Up' (10/10/2022), 'Stage' (Soft Lead), 'Assigned To' (Experience, Partner), and 'Marketing Campaign' (Vendor Campaign 04 - Email - 01). There are also buttons for 'Save', 'Save & Next', 'Save & Close', 'Convert to New Opportunity', 'Delete', and 'Return to list'. At the bottom, there are tabs for 'Summary', 'Form', and 'Campaign'. The 'Summary' tab is active, showing a 'History & Notes' section with a table of notes. The first note is dated 11/17/2022 at 5:07 PM, with the note text 'Stage changed from New to Soft Lead' and entered by 'Experience, Partner'.

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

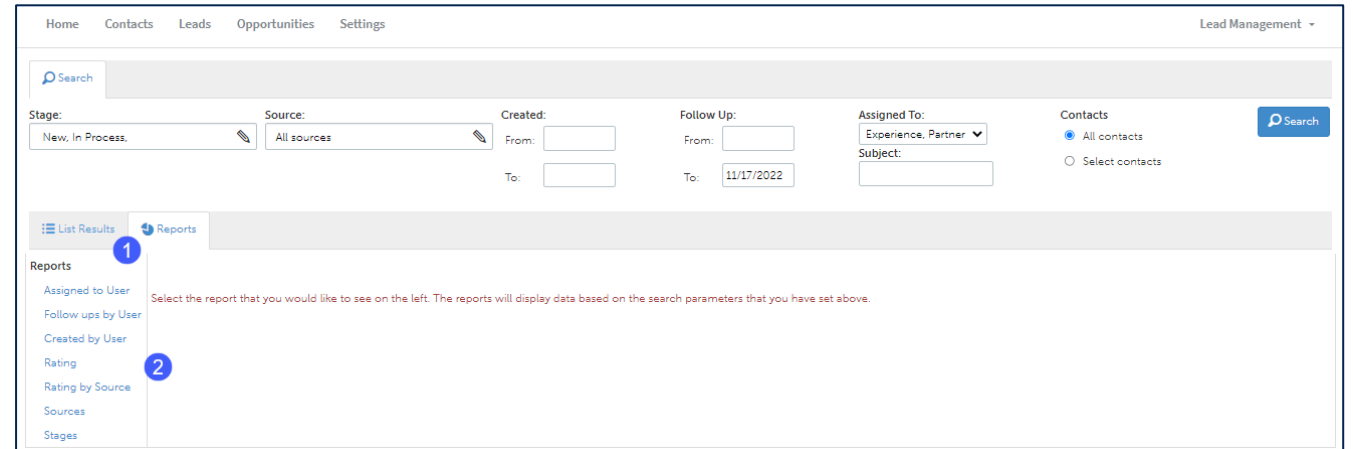
What do I do in the Leads page (4/4)?

[Main Menu](#)

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)?

[Main Menu](#)

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**.

The screenshot illustrates the process of converting a lead to an opportunity in a CRM system. It is divided into three numbered sections:

- Section 1:** The 'List Results' tab is active, displaying a table of leads. The first row is highlighted, showing details for 'Vendor Campaign 04 - Landing Page' assigned to 'Sam Oliff'. A blue circle with the number '1' is placed over the 'Subject' column header.
- Section 2:** The 'Contact' profile for 'Sam Oliff' is shown. The profile includes contact information and a record owner. A blue circle with the number '2' is placed over the '+ Convert to New Opportunity' button in the action bar.
- Section 3:** A 'Warning!' dialog box is displayed, asking for confirmation to convert the lead's stage to 'Success'/'Opportunity'. A blue circle with the number '3' is placed over the 'Continue' button in the dialog.

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

[Main Menu](#)

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**.

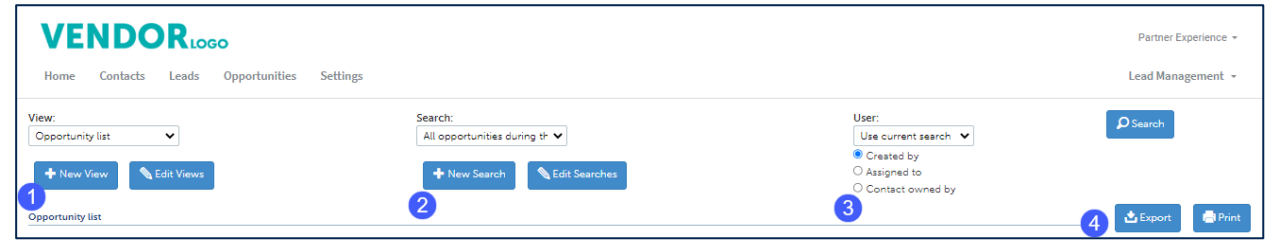
The screenshot shows the 'Opportunity Details' form. It includes fields for 'Short description:*' (containing 'Vendor Campaign 04 - Landing Page'), 'Amount:' (500), 'Profit Margin:' (5), 'Stage:*' (a dropdown menu with '- Evaluation' selected), 'Detailed Description:' (a text area), 'Probability:' (50%), 'Closing:' (a date field), and 'Assigned To:' (a dropdown menu with 'Experience, Partner' selected). A green 'Save' button is at the bottom. Numbered blue circles 1 through 4 are overlaid on the form: 1 points to the 'Short description' field, 2 points to the 'Stage' dropdown, 3 points to the 'Assigned To' dropdown, and 4 points to the 'Save' button. The form also has a section for 'Additional Opportunity Info' with 'Opportunity Source*' (Forms) and 'Related task' (Forms: Vendor Campaign).

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

[Main Menu](#)

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)?

[Main Menu](#)

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

View: Opportunity list Search: All opportunities during th User: Use current search Search

+ New View Edit Views + New Search Edit Searches

Opportunity list Report last run on: 11/18/2022 at 10:07 AM Export Print

| Name | Primary Contact | Amount | Forecast | Stage | Probability | Tasks Completed | Roles Identified | Decision Maker Opinion | Created By |
|-----------------------------------|----------------------------------|--------|----------|------------|-------------|-----------------|------------------|------------------------|-----------------------|
| Vendor Campaign 04 - Landing Page | Sam Oliff sam.oliff@gmail.com | 500.00 | not set | Evaluation | 50% | 0% | 0% | | 0 Experience, Partner |

Opportunity Details

Date created: 11/18/2022 (0 days ago) *Required

Short description:* Vendor Campaign 04 - Landing Page Amount: 500.00 Profit Margin: 10 (%) Stage:* - Evaluation

Detailed Description: Probability: 50% Closing: Assigned To: Experience, Partner

Save Return to the opportunity report

Calendar Notes Email

Tasks Contacts History & Notes Breakdown Amount Custom Fields Additional Info

+ Sales track

Scheduled Activities:

No upcoming activities

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

Main Menu

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**.

Home Contacts Leads Opportunities Settings

Leads Opportunities Profiles

1 Task Work Flow

The task work flow let you set up Task Types and the stages that task must go through in order to be completed.

To add a new Task Type click on the New Task Type button. To add a new Task Stage click on the New Task Stage button next to the Task Type you would like to add the stage to. To delete a Task Type or Stage check the box next to it and click the Delete Checked button. To edit a Task Type or Stage click on the name.

+ New Task Type Delete Checked

| | Task Stage | Stage Description | Task Count |
|--------------------------|-------------------|--|------------|
| <input type="checkbox"/> | Lead | + New Task Stage | |
| | New | Sort the task stages | |
| <input type="checkbox"/> | New | New lead. | 4 |
| <input type="checkbox"/> | Soft Lead | | 0 |
| <input type="checkbox"/> | Warm Lead | | 0 |
| | In process | Sort the task stages | |
| <input type="checkbox"/> | Follow-up | Follow-up. Unclear if this is an opportunity or dead lead yet. | 1 |
| <input type="checkbox"/> | Deferred Interest | Customer does not have immediate interest, call in the future. | 0 |
| | Success | Sort the task stages | |
| <input type="checkbox"/> | Opportunity | New opportunity was generated from this lead | 3 |

2

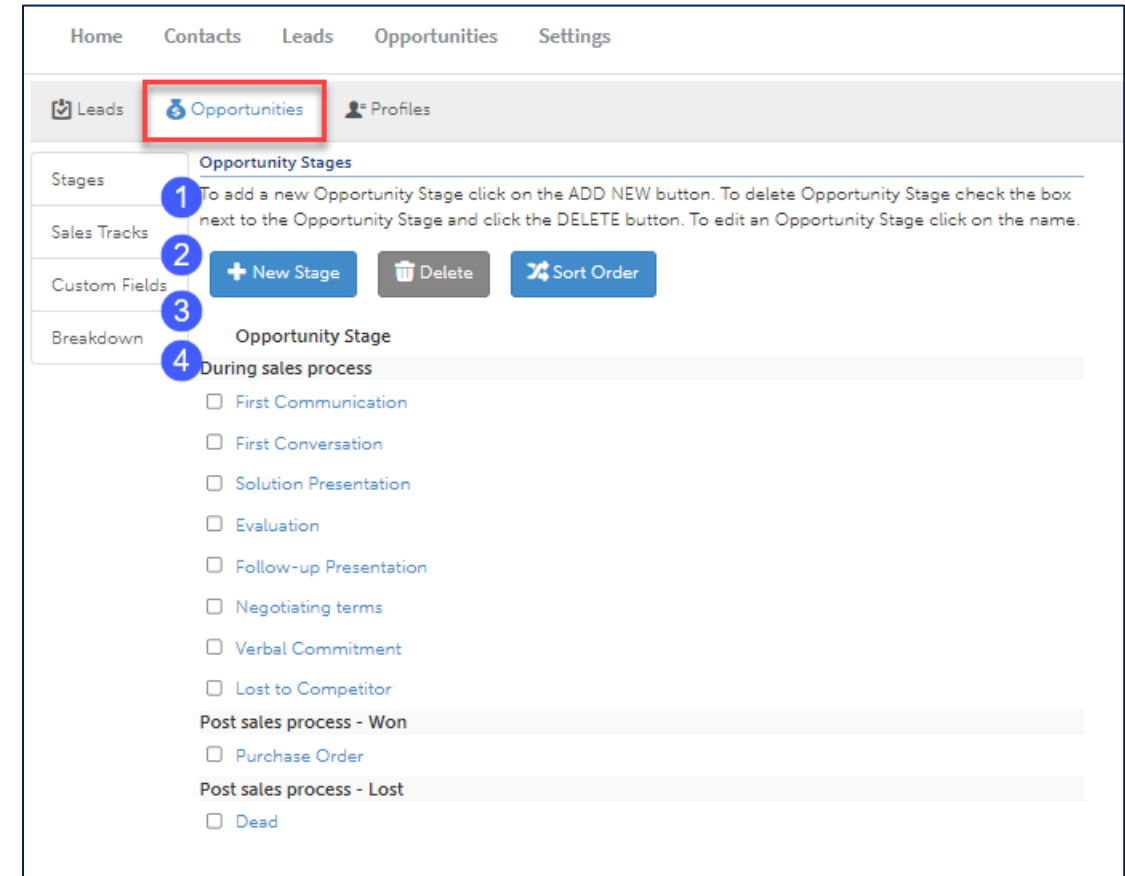
What do I do within the Settings page (2/2)?

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!