CRM Solutions
by LeadMaster

Lead-Xpress Sales Rep Guide

CONTENTS

OVERVIEW

Lead-Xpress allows the user to update LeadMaster from either an email or a link. The link is active as long as the user is listed in either the account manager or partner rep tables.

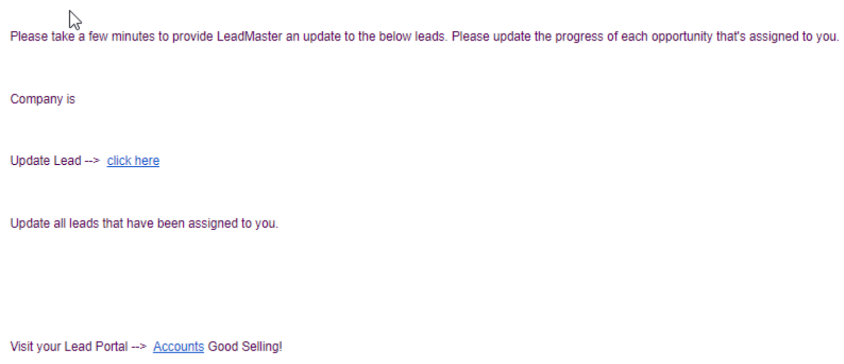
Depending upon the way your LeadMaster administrator has configured Lead-Xpress, you will receive an email with a request to update your accounts / records / leads with a link to a web form.

This method 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 article provides a short explanation of both.

WORKING WITH THE REQUEST TO UPDATE RECORDS EMAIL

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


Please take a few minutes to provide LeadMaster an update to the below leads. Please update the progress of each opportunity that's assigned to you.

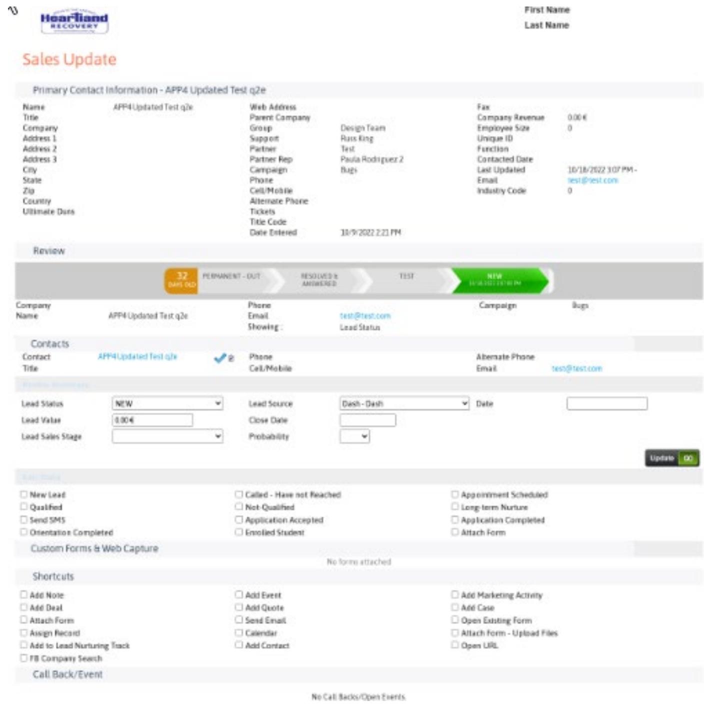
Company is

Update Lead --> click here

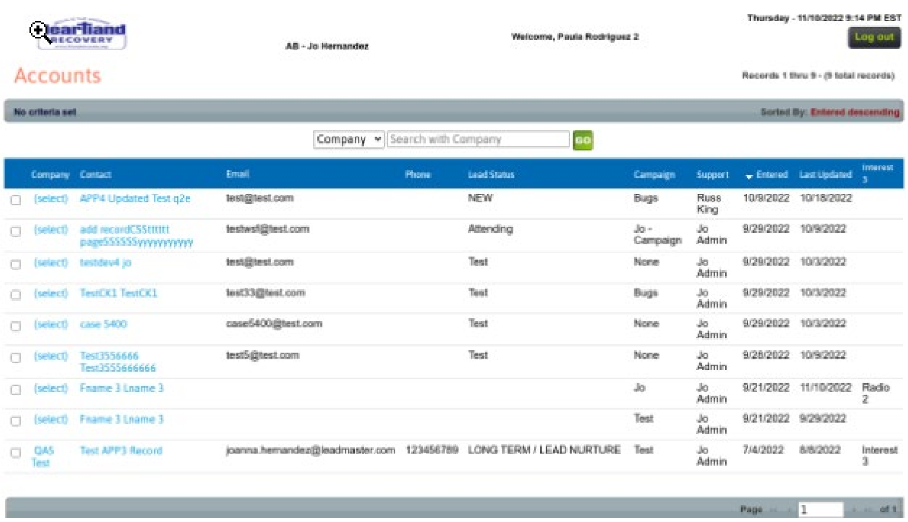
Update all leads that have been assigned to you.

Visit your Lead Portal --> Accounts Good Selling!

To update a Record, you can either click on the "**Update Lead**" link which will redirect you to the Record page.



Or click on the "**Lead Portal**" link to access all of your assigned Records.



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 check boxes are user-definable.

Note: 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.

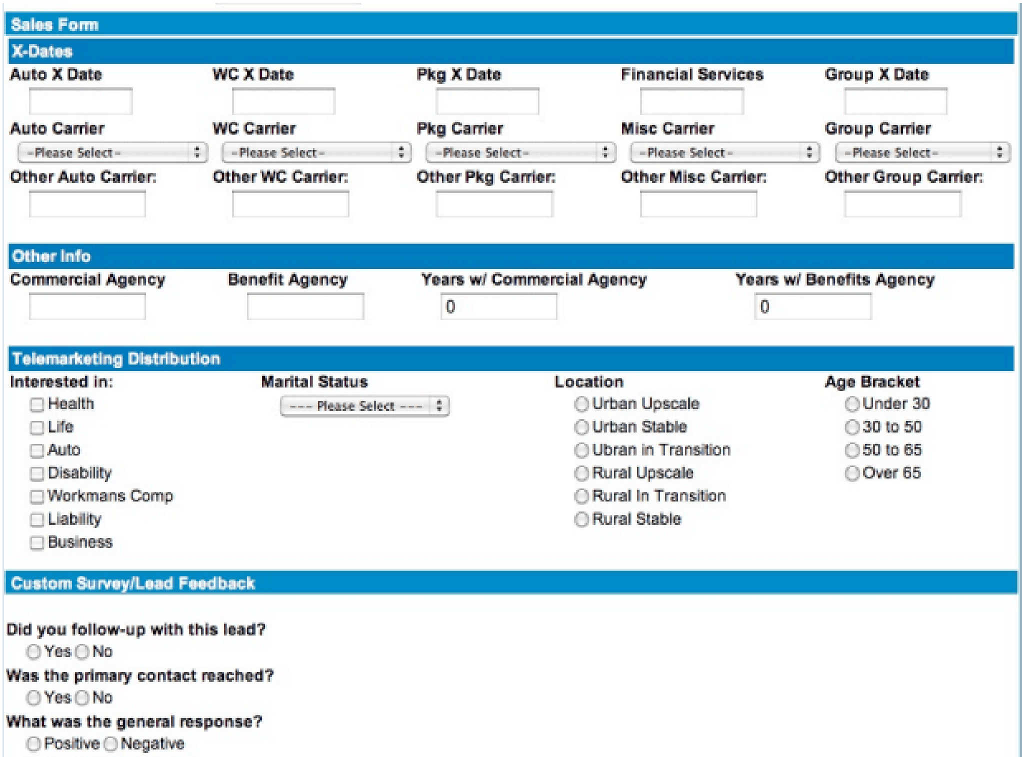
Profile Summary – These are user-definable fields. As shown here they help track both the status of the lead and once an opportunity is identified, the sales stage.

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.



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.

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