List Management – Maintain and properly manage your current list, leads, and organizational info

A CRM segments all contacts and lists to customized and preset groups.

A CRM generates score leads based on behavior, demographics, and interactions.

A CRM measures sales.

A CRM tracks customers engagement or interaction, such as communications between customers and retains & analyzes data.

(Entries), (Storage), (Retrieval)

1. Entry Points –

* Facebook Page
* In-Store
* Online
* App
* Phone System

1. Data Storage – (What data is currently being collected? What databases are currently being used? (Could have a lot of data duplication)

* Stored in 3 In-Store Databases
* Data stored on an Excel spreadsheet
* Data stored on Facebook Page (posts, reviews, likes)
* Data being stored online
* Data being stored in the app
* Data being stored in the phone system

1. Data Retrieval – (Find out how staff are accessing and looking at data…)

* They are retrieving data from the In-Store Database
* They are retrieving data through an Excel spreadsheet (for the Online Store)
* They are retrieving data from a phone system

1. Application Overview
2. Table Structure
3. User Authentication
4. DataPage Creation

You can login as a sales rep.

User Starts Program

User Login Page

User Enters Username (or email address) and Password

User clicks on Login

Dashboard Launches

Sales Funnel is seen on dashboard or graph is seen with sales figures such as stacked bar chart

Below chart all leads are seen.

Can search through leads

Funnel is an aggregate of sales employees are inputting into system in revenue

Assigned To Manager is seen and Total Prospect, Forecast, and Closed are seen

----LEADS, REPORTS Tab

tblCRMUser

Emp\_ID (Random ID),

Name

Email

Password

tblInStoreCust

InStoreCust\_ID

First\_Name

Last\_Name

Job\_Title

Phone\_Number

Email\_Address

Contact\_Method

Company\_Employer

Address 1

Address 2

City

State

Zip\_Code

tblOnlineCust

OnlineCust\_ID

First\_Name

Last\_Name

Home\_Phone\_Number

Cell\_Phone\_Number

Email\_Address

Contact\_Method

Address 1

Address 2

City

State

Zip\_Code

tblAppCust

AppCust\_ID

First\_Name

Last\_Name

DOB

Email\_Address

tblPhoneCust

PhoneCustID

tblFacebookCust

tblLeads (contacts)

InStoreCust\_ID

OnlineCust\_ID

AppCust\_ID

PhoneCust\_ID

tblSales

https://www.youtube.com/watch?v=--wuNQMabUI

Staff Log-Into Dashboard views Customer Leads analyzes Customer Sales

* **Demographics:** contact name, email, phone number, company name
* **Source of prospect:** a note of where the prospect came from so that you know which marketing activities are working
* **Next action code:** a number system for the different actions required to be taken with a prospect
* **Next action date:** the date at which the next action needs to be taken
* **Contact log:** A large cell where you can log all contacts and key discussions with the prospect, making note of any significant buyer hot buttons or opportunities and on what date those discussion took place
* **Lead nurturing stage:** A numbered system of how close the prospect is to purchasing. I use the following system 1 = aware but not interested, 2 = interested, 3 = verbal commitment to buy, 4 = has purchased. This is just the numbering system I use but you could create your own numbering system that works for your business.
* **Estimated opportunity size:** An estimate of how large the sales opportunity is with the prospect. I always record this number as the projected annual sales to the prospect but this could be modified to whatever is applicable to your business.