TASK MANAGEMENT & LEAD PRIORITIZATION

TASK

Task Types

You can create different task types according to the requirements of your business.

Appointments

Have a definite start and end date and time (14 November 2020 2.p.m to 4 p.m.).

Examples of appointments include meetings, webinars, demos, presentations, etc.

Show up on both the classic list and calendar views on the Manage Tasks and Smart Views pages.

To Dos

To dos don't have a specific start and end time.

You can configure to dos to be completed within a certain date range (tomorrow, this week, this month, etc.) but don't have to define a specific time (2 p.m. to 4 p.m.).

Examples of to dos include follow ups on old leads, cold calls, and any task that you don't have to specify an exact time for.

Shows up on the classic list view and on the right pane in the calendar view.

For example, if you're in the real estate industry, you can create a 'Site Visit' task. If you're in the finance industry, you can create a 'Document Collection' task. You also have the flexibility to configure reminders, fields and forms for each task type.

All task types fall under 2 categories – Appointments and To Dos.

How to Create Tasks and Schedule Reminders?

You can create tasks and schedule reminders for your sales users. The first step is to configure task types (follow-up, meeting, appointment, etc.) in your account.

Once you've created the task types you need, navigate to the Manage Tasks page and create new tasks for your users by choosing from one of the configured task types.

Setting a reminder for a task generates an email with the details of the upcoming task. We also send you a daily email report of all your pending tasks for the day..

Note: You can also create a task from the Smart Views page.

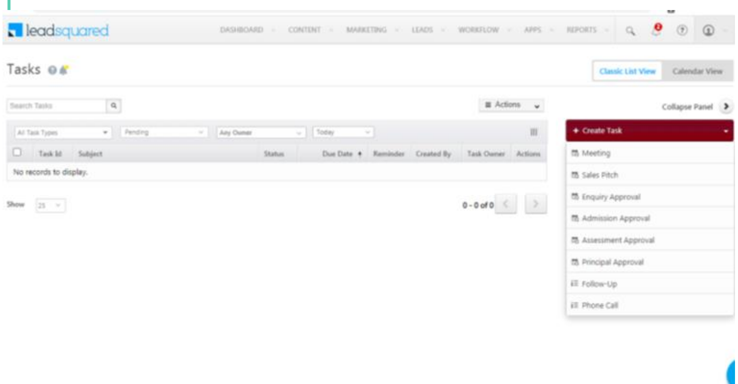
You can access tasks using 2 different views – The classic list view and the calendar view

The classic list view shows you a grid with details of all your tasks. You can filter by task type status, owner, and time. Both appointment and to do type tasks show up on the grid. To do type tasks will usually be at the bottom of the list

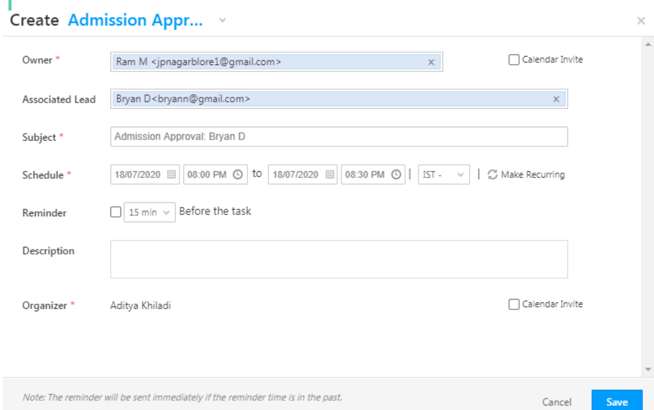
Switch to the calendar view to see your tasks as they're placed for the day, month or week.

The calendar can be viewed in different time zones.
Each user will see tasks in their own time zone. This can be configured while creating or editing a user.

Admins can see the tasks of other sales users in either their own time zone, or in the time zone configured for the sales user. This helps schedule tasks across time-zones. Working hours are also reflected on the calendar with white slots representing working hours and grey slots representing non-working hours –



To assign a task to a user, go to Manage Tasks -> Create Task-> Select the Task



- Select User, Associated Lead and fill out the Task Fields and click on Save.
- When the User logs in they get to see a Task in their name

and get the respective remainder as well

LISTS

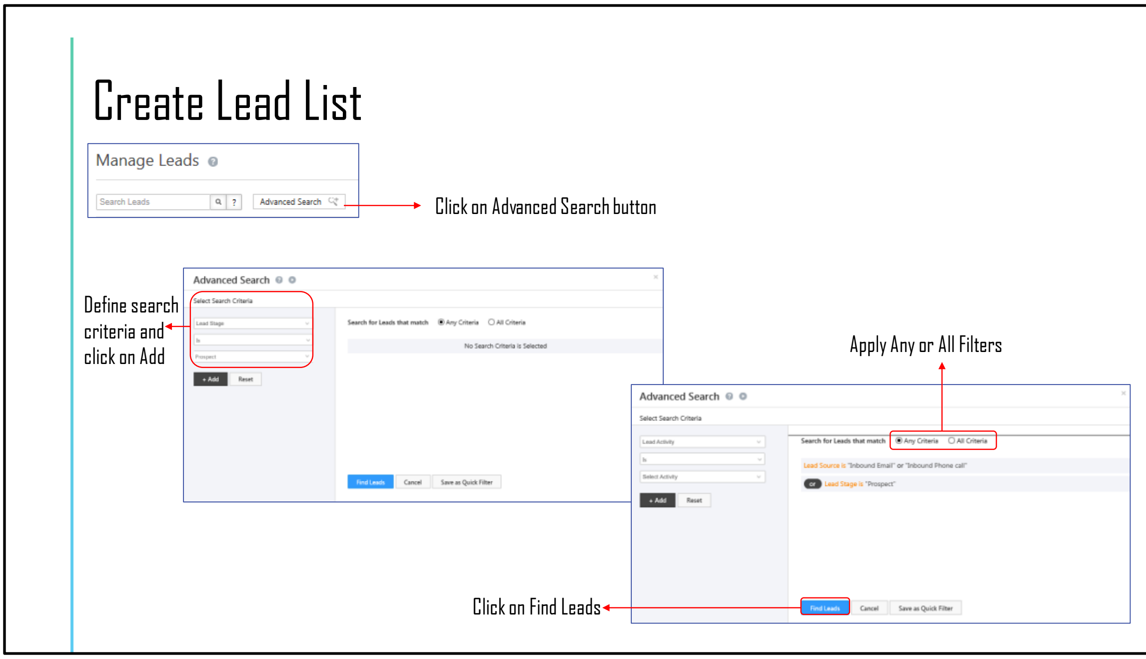
Lead List

Lead lists are a group or collection of Leads. The leads in a list match certain criteria or you can choose to put them together manually.

All Leads
Lead 1
Lead 2
Lead 3
Lead 4
Lead 5
Lead 6
Lead 7
Lead 8

Prospect Leads
Lead 1
Lead 3
Lead 4
Lead 8

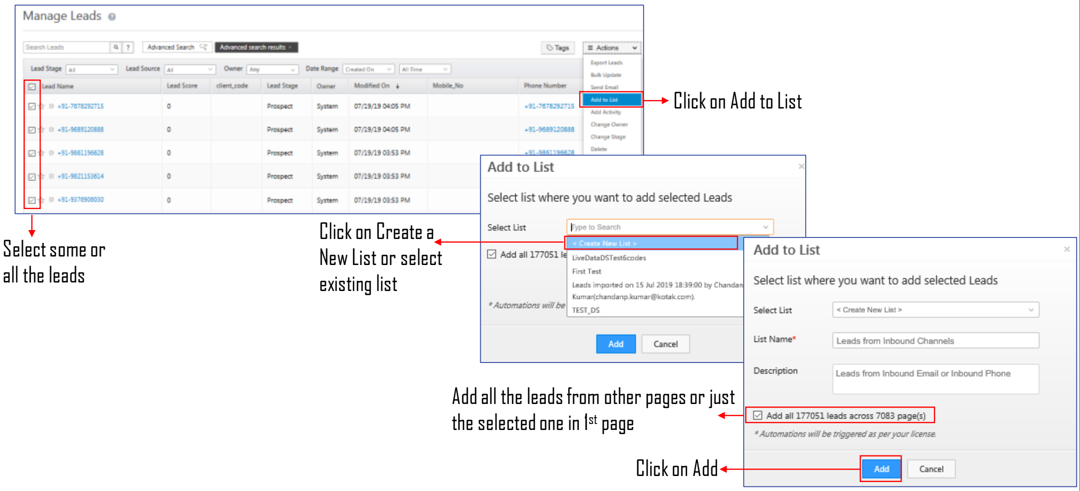
Opportunity Leads
Lead 2
Lead 5
Lead 6
Lead 7



Advanced Search button on the Manage Leads page will allow Business Admins to create a list of leads based on or multiple criteria.

1. From the Managed Leads page, click on *Advanced Search*.
2. In the following pop up screen, under Select Search Criteria, select relevant Lead field in the first drop down, define the criteria condition in the second drop down and in third drop down define the value that should be satisfied.
3. Click on Add button
4. Follow the same steps each time you want to add one more criteria.
5. Click *Any Criteria* to search for leads that match any selected search criteria. Click *All Criteria* to search for leads that match all the search criteria.
6. Once you have defined the search criteria, click on Find Leads button.

Create Lead List – Contd.

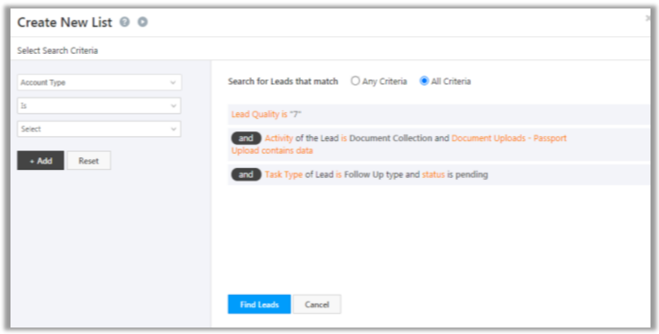


LeadSquared system will take you back to the Manage Leads page displaying the list of leads that satisfies the defined search conditions in the Advance Search.

1. Once you are happy with the results, select some or all the leads and click on Actions button, select Add to List option to add the leads to a list.
2. In the following pop-up window,
    - select "Create new list" in the first drop down and define the List name and Description if needed to add leads to a new list.
    - Select an existing list in the first drop down to add the leads to an existing list.

Alternate Way to Create Lead List

- Navigate to Manage List and Click on Create New List
- Select the criteria you want to base the list on and then click, Find Leads and then Save as Static or Dynamic List



Static List vs Dynamic List

LeadSquared allows you to create two types of lists:

- Static List
- Dynamic List

Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

Dynamic List is a set of leads defined by specific criteria. The criteria could be attributes or activities of leads. The number of leads in the list keeps changing based on leads which meet the criteria specified in the list definition.

Examples

A typical use case of a static list would be a list of the participants who attended a particular webinar. Creating such a list would enable you to send further documentation/communication/offers for those who attend the webinar. You create a static list for this scenario because the participants would not change for that particular webinar.

A typical use case of a dynamic list is a list of all leads from a specific geographic location. Example: Bangalore, India. Creating such a list allows you to send location specific offers or campaigns. The list is updated when the criterion of the location is met, which in this case is Bangalore, India

LEAD PRIORITIZATION

Types of Scores in LeadSquared

There are three types of scores in LeadSquared, each giving specific information to the users.

1. **Lead Quality Score**: Defining the quality of the leads based on certain rules relevant for business.
2. **Lead Score**: Defines the lead's performance based on different activities lead has been involved in, like email open, inbound call etc. It is applicable for all leads based on various scores defined and for entire timeframe the lead has been in the LeadSquared system.
3. **Engagement Score**: Is a sub-set of Lead Score where in conditions can be defined to gauge the engagement of the lead based on chosen Lead Stages, Timeframe and specific set of activities like Email link open, Email opened, Inbound call etc.

Activity and Activity Score

Before we understand Engagement Scoring, it is important to understand how the scores are defined for each activity

There are two types of Activities in LeadSquared:

Core Activity	These are the activities posted by System by default. For example: Email – Link clicked, Email – Unsubscribed, Phone Call – Inbound and Lead Capture etc.
Custom Activity	These are the activities posted by the Users. For example: Site Visit, Document Collection, Call Disposition etc.

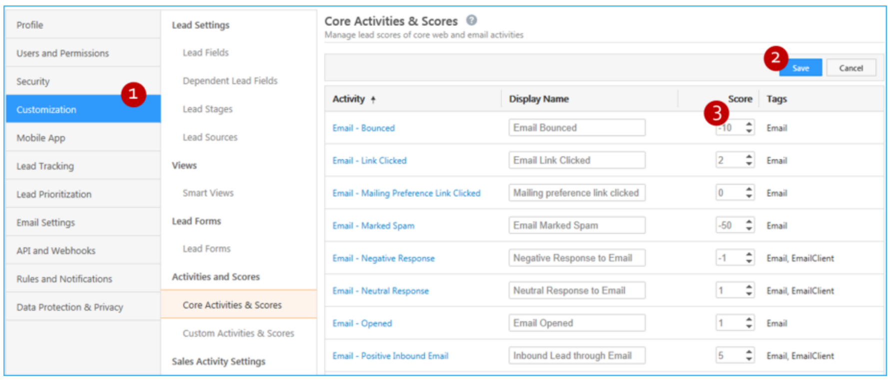
LeadSquared comes pre-built with several core or system activities like email bounced, email link clicked, website page visited, lead captured, etc. We automatically post these activities against your leads whenever they are performed. The activities then appear in the Manage Activities page or on the lead's detail page.

Note: Core Activities cannot be deleted whereas Custom Activities can be deleted or modified.

In addition to core activities, you can also create custom activities to accommodate your own unique use cases. You can also add fields within each custom activity to capture relevant data.

Defining Activity Score

Navigate to **Settings → Leads → Core Activity & Score or Custom Activity & Score**



Lead Score is a numeric value associated with a Lead which allows you to measure its relative importance over other leads in the system. It allows you to segment hot Leads from the remaining leads. Lead Score is based on Notable Activities updated against the leads. A Notable Activity is any event that is of importance in the life cycle of Lead.

When a lead performs any of the notable activity, the lead score gets automatically updated. For instance, Submission on a Landing Page may have a score of 100 associated to it. Hence when a lead submits on your landing page, the lead is automatically is updated with a score of 100.

Lead Score

Lead Score is the measure of Lead activity in response to your marketing offers.

An engaged Lead interacts with you online or offline. These interactions are essentially Lead activities with varied level of importance.

Example: An Email Open event by your Lead is important but not as important as the submission on a Landing Page. You need to capture both but as it has different levels of importance, you need to assign different values or scores.

To compare two Leads, you need to aggregate all activity scores in a given time frame. This aggregate value is called Lead Score. Lead Score tells you which leads are relatively more active than the others in a given time frame. The change (or delta) in Lead Score in a given time period (Example: day, week, month and so on) is the measure of its activity.

Benefits of Lead Score

Lead Score helps to identify and classify leads into 3 segments allowing you to focus on the business relevant set of leads.

- Active & Business Relevant Leads (Positive Score)
- Dormant Leads (Zero/Neutral Score over time)
- Not Interested or irrelevant Leads for Business (Negative Score)

Active & Business Relevant Leads (Positive Score) – These Leads engage online or offline thereby obtaining high Lead Scores which allows you to focus your business with these leads.

Dormant Leads (Zero/Neutral Score over time) – These leads never engage with online campaigns or Email campaigns. (No email opens or link clicks or online form submission activities). These leads can be marked as Inactive and moved to Inactive Lead Stages over time.

Not Interested or irrelevant Leads for Business (Negative Score) – These leads tend to obtain a negative Score by marking the emails as SPAM or unsubscribing from Email communication. Some are marked as opted out due to invalid Email IDs resulting in Email Bounce activity.

How Lead Scoring Works?

The most important aspect of Lead Scoring is the weight you assign to each activity. It should reflect how you want to differentiate the importance of activities that happen in lead lifecycle.

Example: You may configure LeadSquared with following Lead Scores:

Lead Activity	Score
Email Open	02
Email Link Click	05
Webpage Visit	02
Landing Page Visit	05
Landing Page Submission	10
Phone Call	20

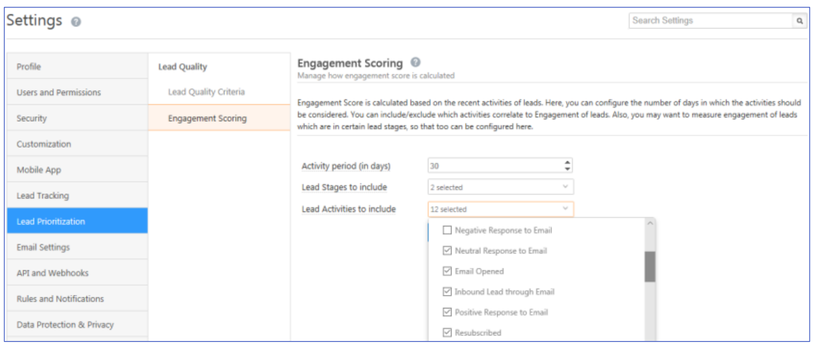
Consider you have a new business opportunity and you do an Email Campaign for it. One of the recipients (or Lead) opens the Email, clicks a links on it, comes to your Landing Page and submits. The aggregate Lead Score here is 2+5+5+10=22.

Consider another recipient opens the Email but does not do anything immediately. The lead visits your webpage later, visits your Landing Page but does not submit. The lead makes a phone call after two business days. The aggregate Lead Score in this scenario is 2+2+5+20=29.

Both Leads are important for you but since you configured Phone Call with a score of 20, the second lead has a higher Lead Score than the first and you can prioritize accordingly.

Engagement Scoring

"Lead Engagement Score" captures the engagement level of Leads. It is a quantifiable number that helps in finding engaged vs dis-engaged leads and comparing leads based on their relative scores.



The definition of what constitutes Engagement is customizable in LeadSquared. To setup custom Engagement Scoring navigate to Settings → Lead Prioritization → Engagement Scoring.

You can select to which all leads it should be applicable by selecting the Lead Stages, thus, letting the system to identify the leads based on lead stage for which engagement scoring must be calculated. For example in this case 2 lead stages are selected which includes Prospect and Opportunity.

Also, you can define the engagement score should be mapped to which all activities like email link open, positive response to email etc.

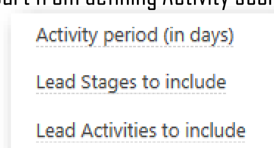
Lead Score vs Engagement Score

Lead Score

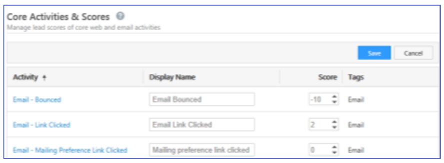
- Scored based on all the activity scores defined in the system
- Applicable to all the leads irrespective of which Lead Stage they are in
- Applicable for the entire timeframe the lead is present in the LeadSquared system
- Only Activity scores must be defined to calculate the Lead Score. No other configuration is required

Engagement Score

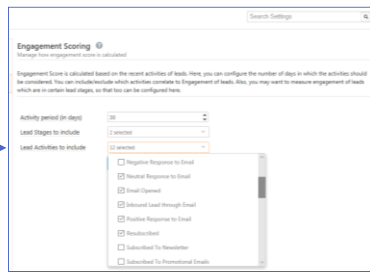
- Calculated based on the chosen lead activity's score
- Applicable only to the leads who are mapped to chosen lead stage/s
- Engagement scoring of the leads are calculated based on the activity period defined
- Conditions to calculate engagement score must be configured apart from defining Activity scores

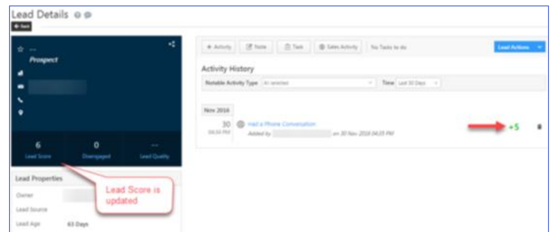


How Lead Engagement Scoring Works?



Define Activity Score





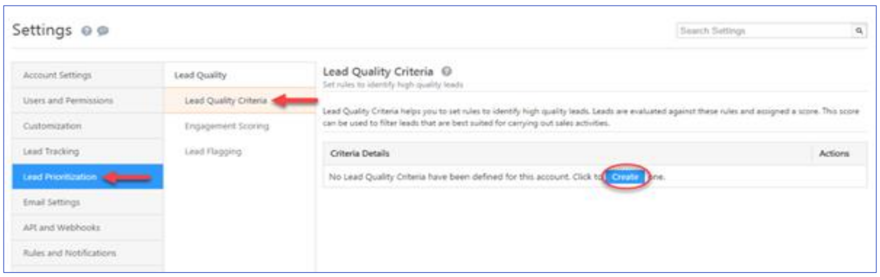
System calculates Engagement Score

Define the timeframe, Lead Stages and Activities to be considered

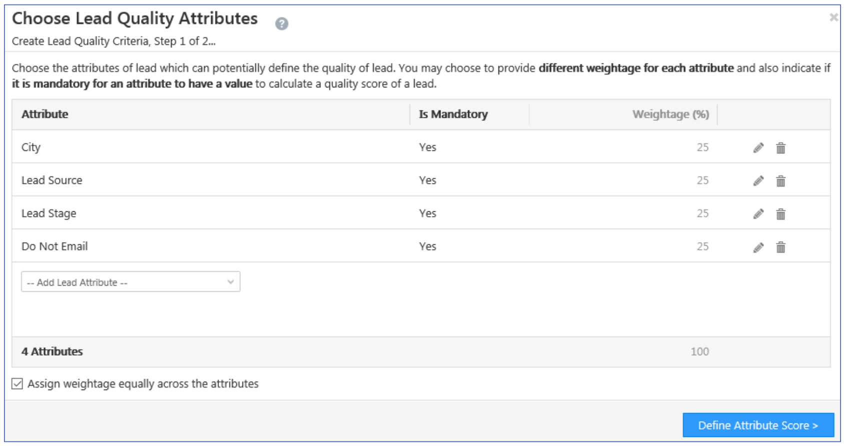
Lead Quality Score

Lead Quality Criteria helps you to set rules to identify high quality leads. Leads are evaluated against these rules and assigned a score. This score can be used to filter leads that are best suited for carrying out sales activities.

To setup Lead score, navigate to: Settings → Lead Prioritization → Lead Quality Criteria and click on Create

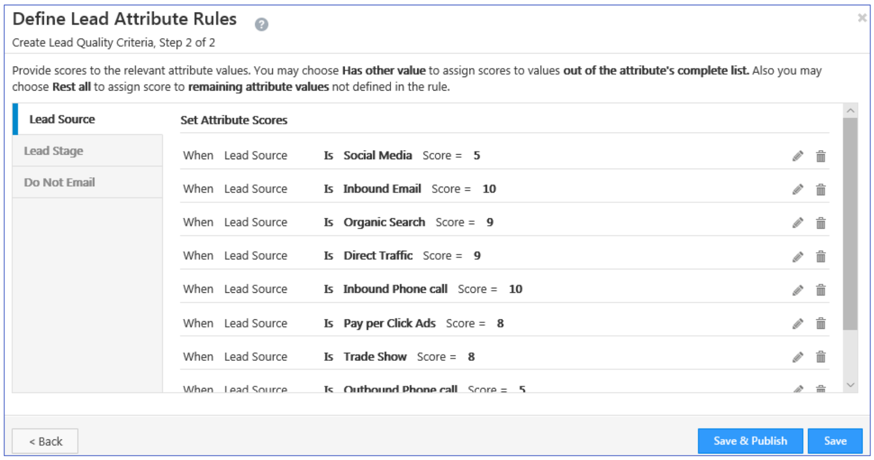


Creating Lead Quality Score Steps



Choose the attributes of lead which can potentially define the quality of lead. You may choose to provide **different weightage for each attribute** and indicate if **it is mandatory for an attribute to have a value** to calculate a quality score of a lead. If different weightage should be provided to different attributes, deselect Assign weightage equally across the attributes.

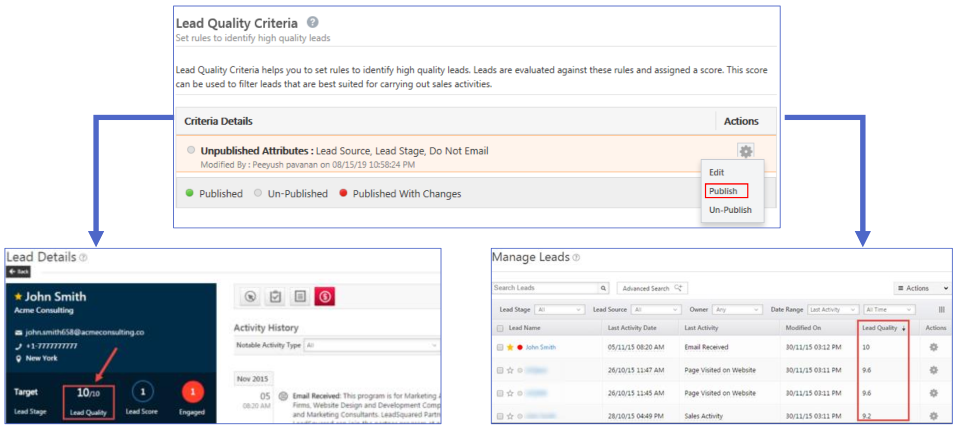
Creating Lead Quality Score Steps



Provide scores to the relevant attribute values. You may choose **Has other value** to assign scores to values **out of the attribute's complete list.** Also you may choose **Rest all** to assign score to **remaining attribute values** not defined in the rule.

Scores can only be within the range of 0 to 10. null value can be given for attributes like Do Not Call, Do Not Email etc if the customer has opted out which makes the condition as yes.

Publish the Lead Quality Scores



Note: It may take few minutes (depending on # of leads in your account and # of rules in quality score criteria) when the quality score is being computed for the first time. Once the quality scores are available, you can view it in Lead Details of the lead. See the image for reference.

You can define the following scores to the following core activities:

LEAD TRACKING

Tracking URL

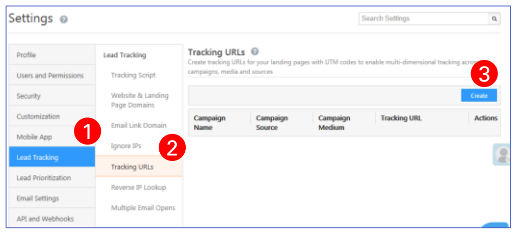
Tracking URL feature in LeadSquared allows you to use landing page in multiple marketing campaigns, such as Facebook, Google Pay Per Click ads and so on.

A landing page with tracking URL looks like this (Token is in bold):
http://pages.leadsquared.com/Webinar-How-to-Get-Started-With-Website-SEO**?utm_source=Pay%20per%20Click%20Ads&utm_medium=Google%20PPC%20Ads&utm_campaign=How%20to%20get%20started%20with%20SEO**

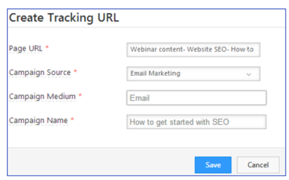
You should use tracking URLs when you're directing traffic to a landing page from somewhere other than a call-to-action on your own site, like an email blast, PPC campaign, banner ad, and so forth. By using tracking URL feature, you can accurately track the lead source. For example, you might want to know how many users come to a landing page from a particular Facebook ad, or Google Search ad, or how many users signed up on your newsletter landing page on a particular website page.

How to create a Tracking URL

- Navigate to Settings → Lead Tracking → Tracking URL and click on Create button

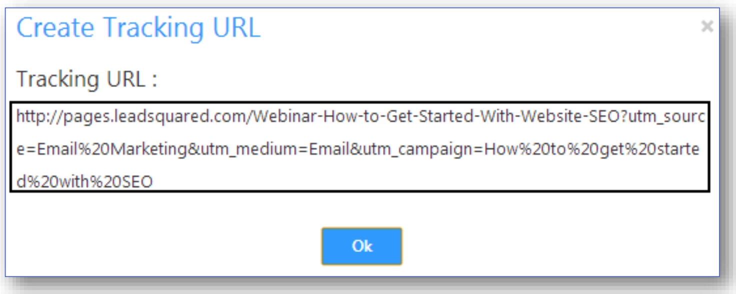


- Enter the tracking URL information in the box and click on save.



How to use the tracking URL

Copy the Tracking URL that appears, and use that as the hyperlink in your Email, Google Adwords, Facebook ad, etc. In this way, you can accurately track the lead source and the source medium.



Please Complete Exercises

Open the Step-by-Step Exercise document from https://myleadsquared.sharepoint.com/:b:/s/LeadSquared_Training/EWXYX7MDgOdHkOObXM5UkTkBvaNcRr5dUw7jAsFcACf46w?e=TGdnFA and complete till chapter 16

x

THANK YOU!