LEAD MANAGEMENT

LEAD RECAP

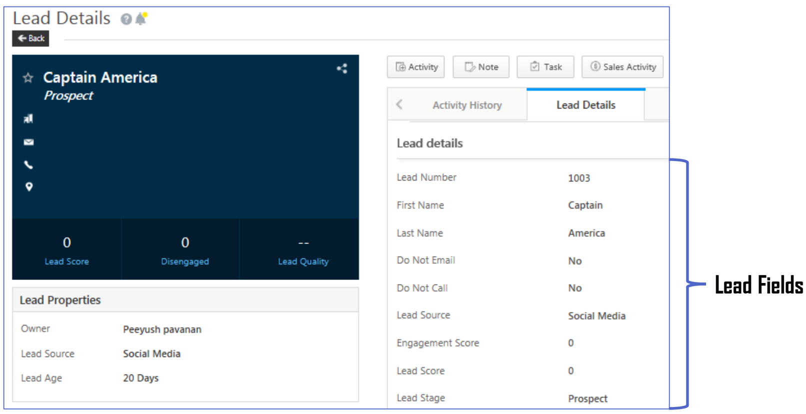
Who is a lead?

- A person who buys the product?
- A person who is selling the product?
- A person who has shown interest in your product?

LEAD FIELDS

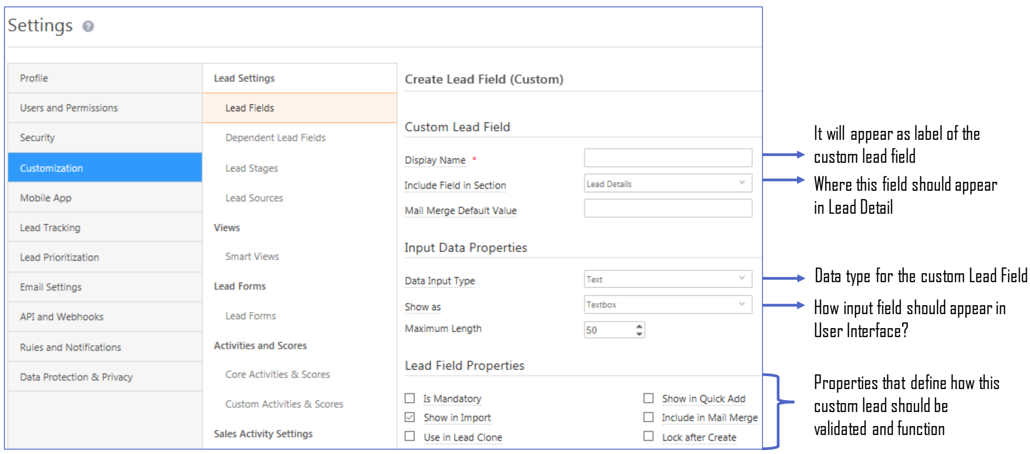
Lead Fields

Lead Fields are the specific fields where you store the details of the Lead that are relevant for your business need. For example: First name, Last name, Phone number etc.



There are core lead fields comes with the LeadSquared application and custom fields which are generally created business to business by the admins during the customization to meet the business requirement.

Lead Field Settings



<u>Different types of Data Input with respective settings for custom leads are:</u>

1. Text: Textbox or Textarea
2. Number: Decimal or Integer
3. Email: Email
4. Phone: Textbox or Phone Control
5. Website: Url
6. Date: Date or Date Time
7. Time: Time
8. Dropdown: Dropdown, Searchable Dropdown or Dropdown with others
9. Multi-select Dropdown: Multi-select Dropdown
10. Boolean: Radio or Checkbox

<u>Further settings for</u>

Phone: With Phone Control option you can restrict Phone numbers length by defining maximum and minimum integer

Dropdown: You can have…

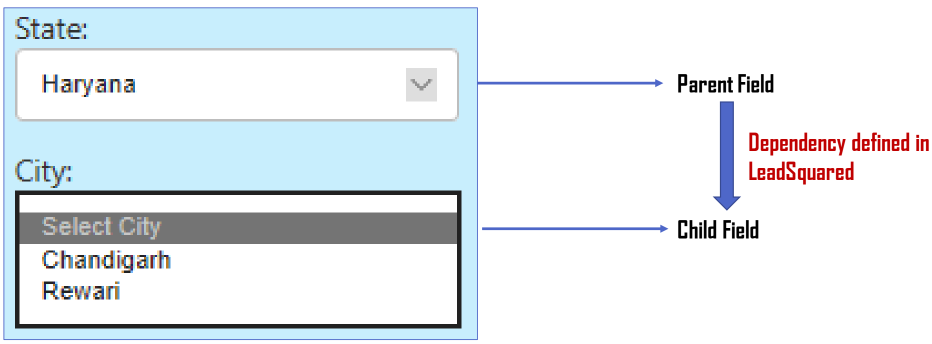
…Searchable dropdown values. You can key in the text field and see the relevant options available, matching the letters entered

…and dropdown with others. This dropdown field will have **Others** as a default option along with the list of options provided.

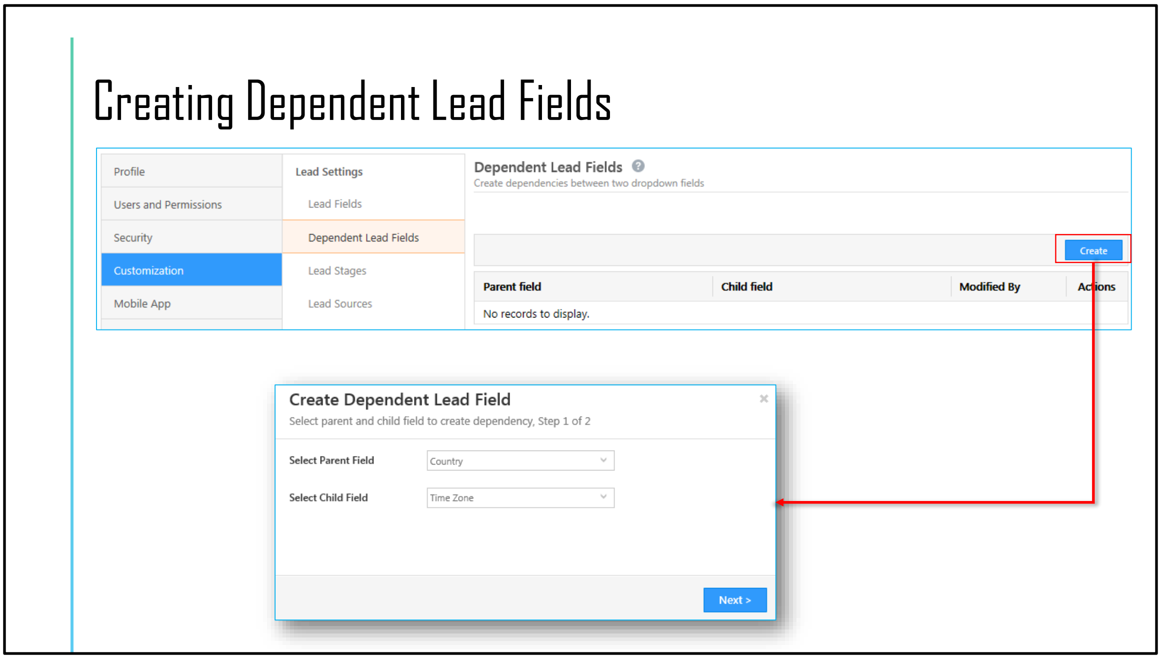
Dependent Lead Fields

In LeadSquared, you can create a dependency between two or more drop-down lead fields.

For example: By selecting a value in State field, City field would show you the relevant options. In this scenario, State field will become the parent field and City field will be the child field



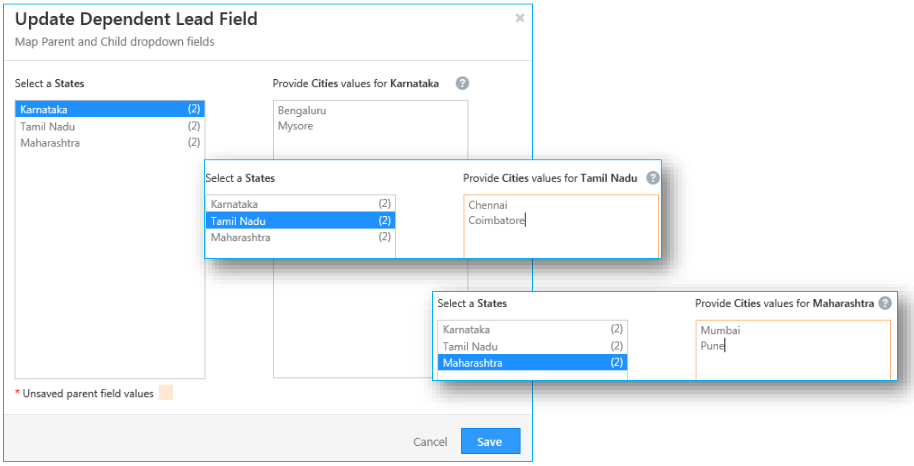
This feature allows you to create a dependency between two or more drop-down lead fields. You can create dependency between any two drop-down lead fields by selecting them as the parent and the child fields, respectively. This dependency can be used in the various Lead Create forms of LeadSquared.



To create Dependent Lead Fields, first you need to identify the parent and child field. You can find the list of Lead Fields by going to Settings → Customization → Lead Fields under Lead Settings

Once the parent and child fields are identified, navigate to Dependent Lead Fields from Settings → Customization → Dependent Lead Fields and click on Create button to create the dependent lead fields

Creating Dependent Lead Fields



- Once you have selected the Lead fields for Parent and Child, click on Next.
- In the next window, you will see parent column and child column.
- In the Parent Column, you will see the options defined in the Lead field mapped to Parent field. Select individual fields and define the values to be displayed in the Child Field by writing it manually in Child Column.
- Do the same for all the parent values one by one.
- Once, the child values are defined for all thee parent values, click on Save. You have successfully created the dependent lead fields.

Lead Fields

In this assignment, you will be

- Creating custom lead fields
- Creating dependent Lead fields

In our case of S.H.I.E.L.D. you will have to create four custom lead fields.

1st Lead Field: **Superhero Power**: This lead field must be multi-dropdown with following values: Super Speed; Super Strength, Agility, Flight, Immortality, Invisibility, Teleportation, X-ray Vision, Telepathy and Regenerative Healing Power

2nd Lead Field: **Superhero Rating:** This field should be dropdown but not multi-dropdown with following values: 1, 2, 3, 4, 5, 6, 7, 8, 9 and 10.

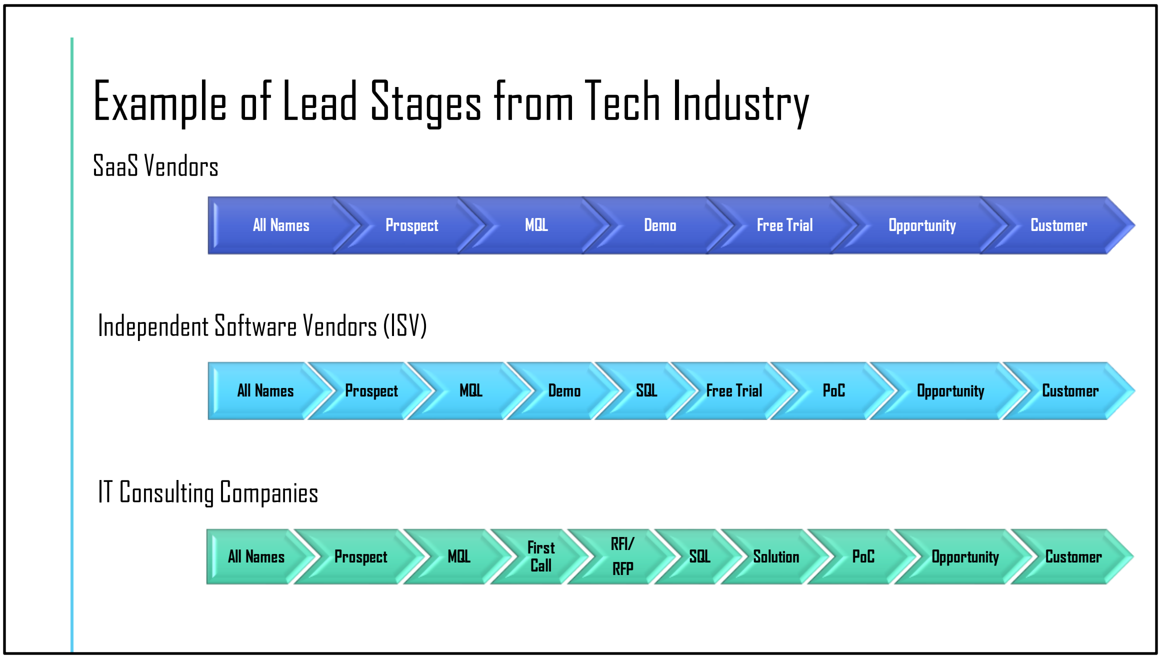
3rd Lead Field: **Credit Rating:** This field should be dropdown dependent on Superhero Rating field with following values:

- if the Superhero rating is 1 – 100, 150, 200
- if the Superhero rating is 2 – 200, 250, 300
- if the Superhero rating is 3 – 300, 350, 400
- if the Superhero rating is 4 – 400, 450, 500
- if the Superhero rating is 5 – 500, 550, 600
- if the Superhero rating is 6 – 600, 650, 700
- if the Superhero rating is 7 – 700, 750, 800
- if the Superhero rating is 8 – 800, 850, 900

- if the Superhero rating is 9 – 900, 950, 1000
- if the Superhero rating is 10 – 1000, 1050, 1100

4th Lead Field: **Superhero Name:** This field should be text.

LEAD STAGE



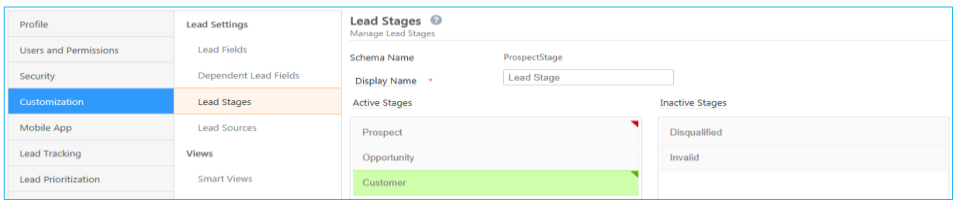
As we learned in Sales Funnel and Lifecycle Marketing concepts a consumer goes through various stages before purchasing the product/services.

Thus, it is important to identify at which stage the leads are in order to take appropriate action to convert the lead into a customer or loyal customer. LeadSquared allows you to identify the leads with standard or custom lead stages as per the client's requirement.

As the customer journey continues from one stage to another respective activities and task can be assigned automatically or manually as per the client's requirement. In above slides, you can see the typical lead stages a consumer moves in Tech Industry

Managing Lead Stages

As a first step, Navigate to: **Settings → Customization → Lead Stages.** You would see the Stages Classified as **Active & Inactive Stages.**



You can add, delete or rename any of the existing lead stages. Final Stage however cannot be deleted/removed

Lead Stages help you with the following:

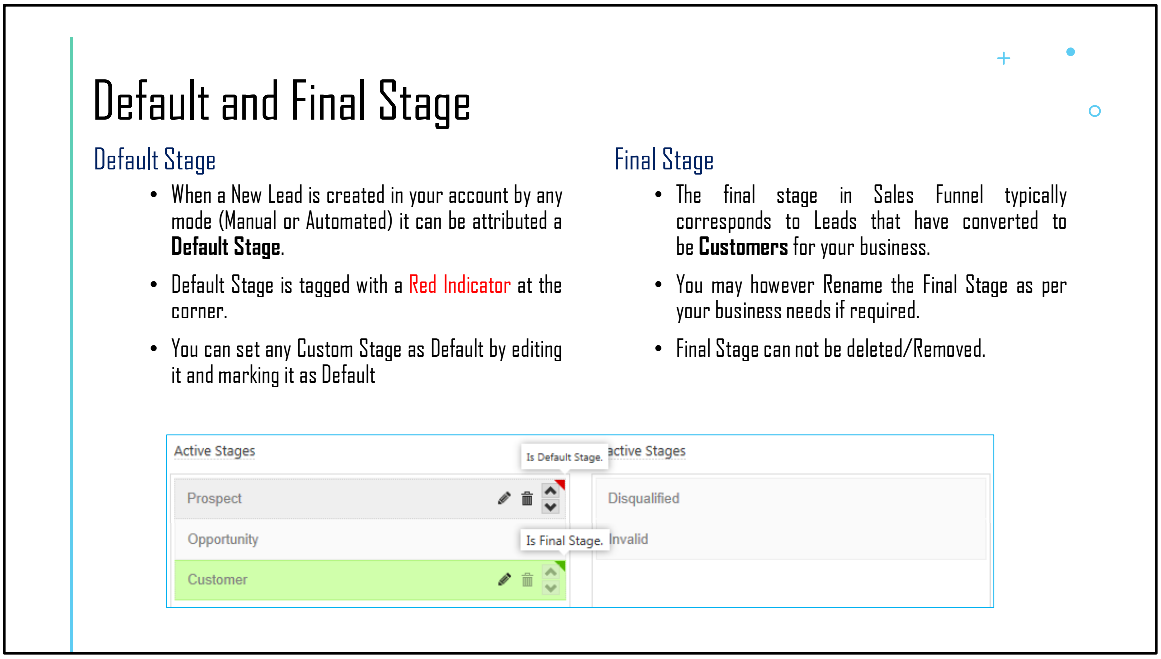
- Keep track of Leads at various levels of Sales/Marketing Cycle/Funnel.
- Qualify Leads and move junk leads to Inactive Stages thereby refining your Leads to be worked on.
- Leads at different levels can be engaged with relevant Nurturing content and methods

By default, LeadSquared is configured with three fundamental Lead Stages:

- Prospect
- Opportunity
- Customer

Lead Stages may vary from company to company and industry to industry. Keeping this variation in mind, **LeadSquared allows you to customize and add Lead Stages relevant for your business needs**.

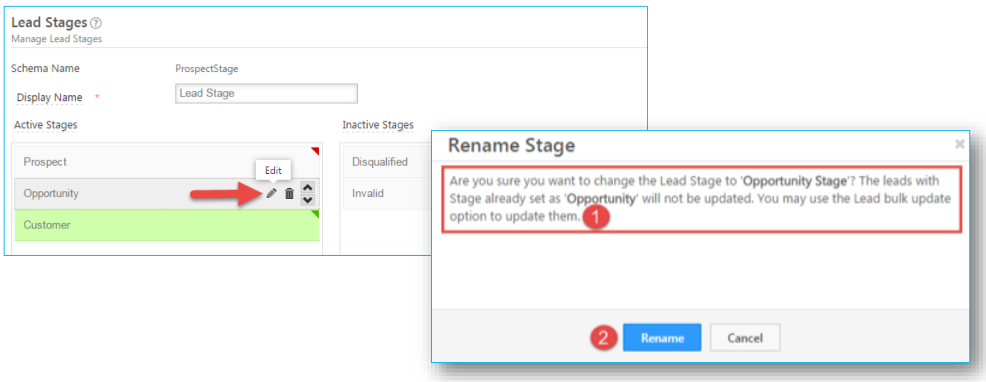
The **Active Stages** are linked to the **Overall Lead Funnel** available on **Administrator Dashboard.** Overall Lead Funnel shows leads in different Active Lead Stages. This helps in easy monitoring of Leads in various levels in the business process.



- Prospect Stage in pre-set as the Default Stage in your LeadSquared account.
- By default Final Stage is named as Customer in LeadSquared Account

Renaming Lead Stage

To rename or Modify a Lead Stage, click on Edit icon next to the lead stage name

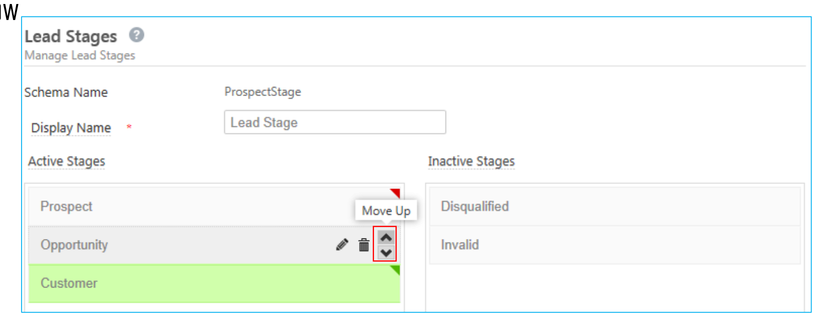


Note: Before Modifying the Stage name kindly make sure that no leads are attributed with the Stage being modified. In case the lead stage is being renamed, the existing leads which are assigned with old values will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Reorder Lead Stages

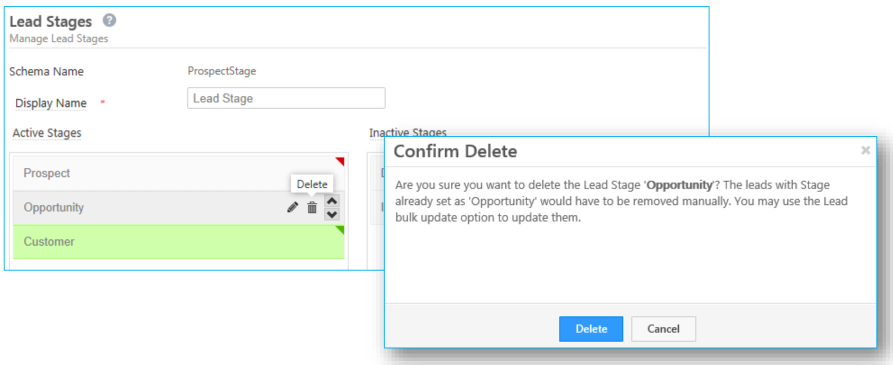
You can **Reorder** or **Change the sequential listing** of Lead stages as per your requirement.

Stages can be moved up and down using the Up-Down icons on Each Stage as shown in the Image below



Delete Lead Stages

You may delete a Lead Stage by clicking the **Delete Icon** available on the Stage Name.



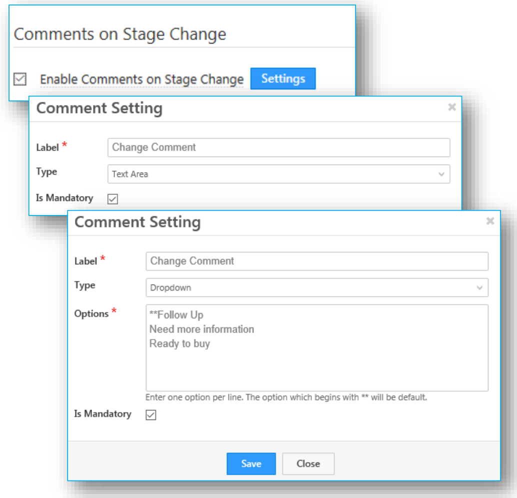
Note: Kindly make sure that No leads are associated with the Stage before deleting it.

On clicking You will see a confirmation popup where you can confirm **Delete** operation. In case the lead stage is being deleted, the existing leads which are assigned with stage being deleted will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Comments on Stage Transition

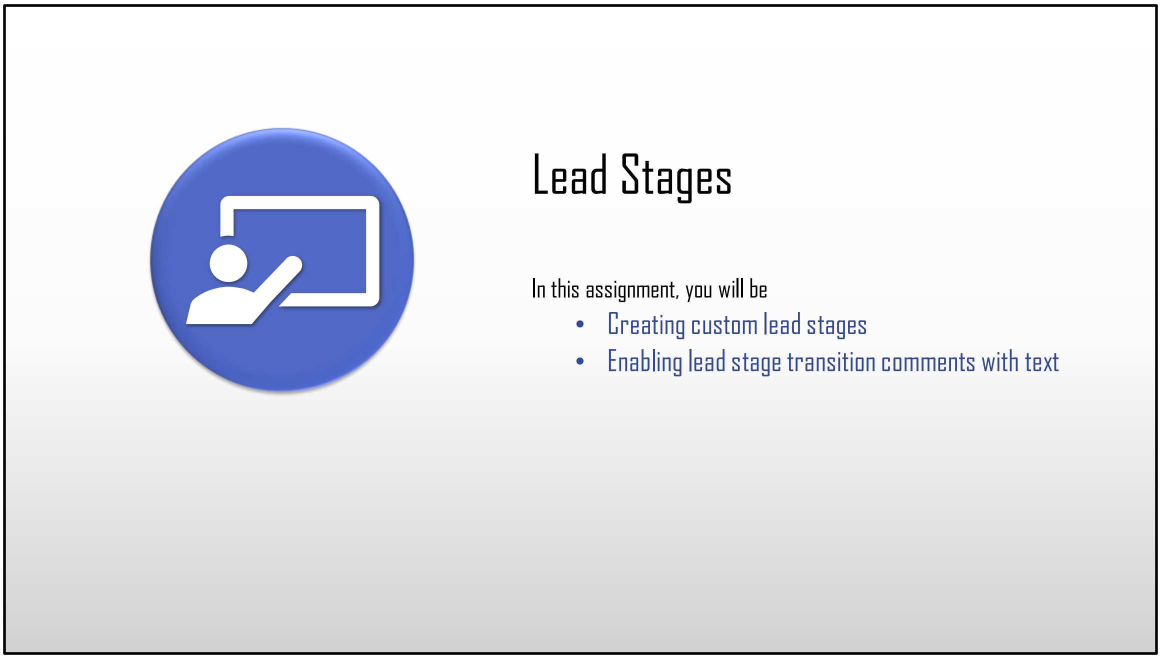
To enable comments on Stage Change → Select the **Check box** > You will see **Settings** button.

1. You may modify and specify the Label name.
2. Choose the data input type as **Text Area** or **Dropdown** for the Comments field. If you select Dropdown, you can specify the options.
3. You may make it mandatory for the Users to add a reason/comment while changing Lead's Stage.
4. Click **Save** to complete configuration.



You can enable *Comments on Stage Change* so that your Users can add a Note/Reason while changing the Lead's Stage in your Sales/Marketing Funnel.

Note: ***Change Comment** Field* will be seen on **Change Stage** popup while performing Lead Stage Change for a lead from Manage Leads or Lead Details page.



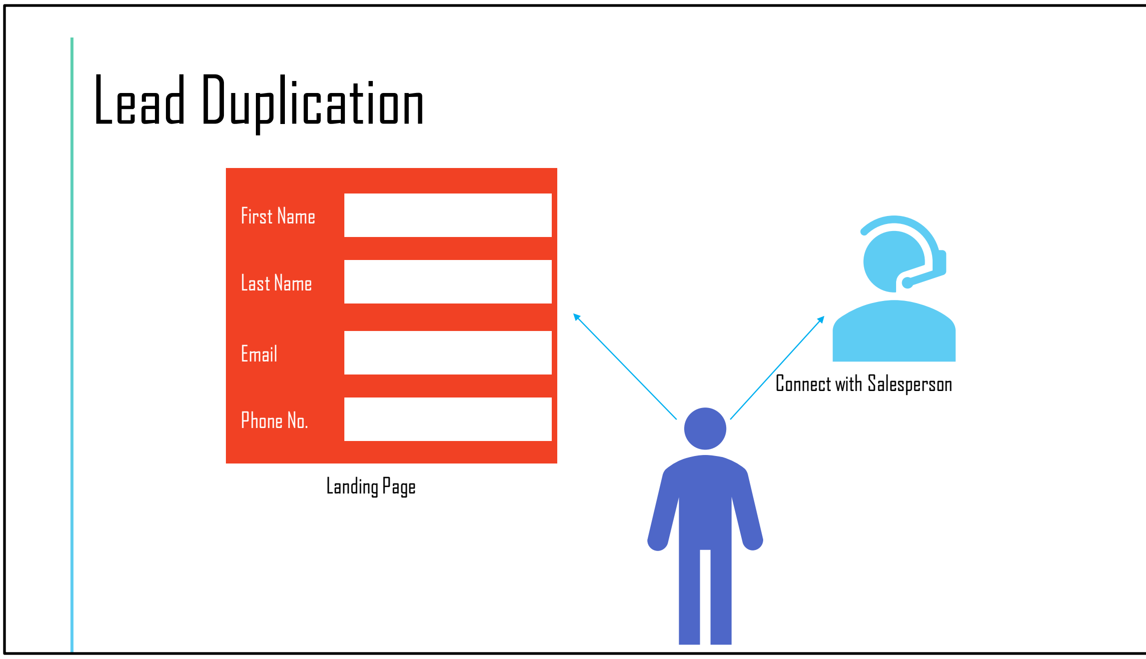
For our use case; create following lead stages:

Active Stages:
New Superheroes (Default stage)
Prospect
Opportunity
Superheroes Onboarded (Final stage)

Inactive Stages:
Villain
Disqualified
Invalid

Also, enable lead stage transition comments.

LEAD DUPLICATION



Considering Leads can be generated in many ways, lead duplication is one of the scenarios that may occur in real life, but we have ways to handle that in LeadSquared system.

For example: a user may have submitted his/her details when the sales user called and later submitted his/her details on the landing pages.

Since, LeadSquared has the provision to capture leads from phone call as well as from landing page and other channels, the details shared by the user can get duplicated unless you configure ways to counter that to ensure captured leads does not create duplicate records in the LeadSquared if already existing in the database of LeadSquared.

In coming few slides, we will see how to handle duplicate leads.

How to handle Lead Duplication?

Some of the best practices that could be followed to ensure duplicate leads are not created in the LeadSquared system are:

1. Have a unique field, like: Email, Phone number or any custom field etc.
2. While importing the Leads from CSV file to LeadSquared system, you can
   - Ignore duplicates
   - Overwrite duplicates
   - Update empty fields of duplicates

As a pre-requisite determine the unique lead field which would be validated by the LeadSquared system before adding a record into the LeadSquared database like, Email or phone number or custom lead fields like PAN number etc.

This unique field will be validated by LeadSquared system no matter from where the leads are getting generated, like Facebook plugin, Landing page or manual entry.

However, another scenario arises during Lead Import where in the CSV file is imported into the LeadSquared system. Considering the file imported may or may not contain already existing leads, system gives you a checkpoint during import asking how to handle the lead duplicates.

This could be either ignore duplicated, overwrite duplicates or update empty fields of duplicates.

- **Ignore duplicates:** If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.
- **Overwrite duplicates:** If you select this option, the CSV file data will overwrite the data in your LeadSquared account.

- **Update empty fields of duplicates:** With this option, only empty fields of the duplicate records in LeadSquared will be updated with the data in the CSV file.

Following link talks about how to make a custom lead field like PAN number etc as unique field: https://help.leadsquared.com/how-to-make-a-custom-field-unique-in-your-leadsquared-application/

Lead Sources

Lead Sources

Lead sources are the avenues through which leads come to your website.

You can add, remove and customize your lead sources

By default, you'll find the following lead sources in your account –

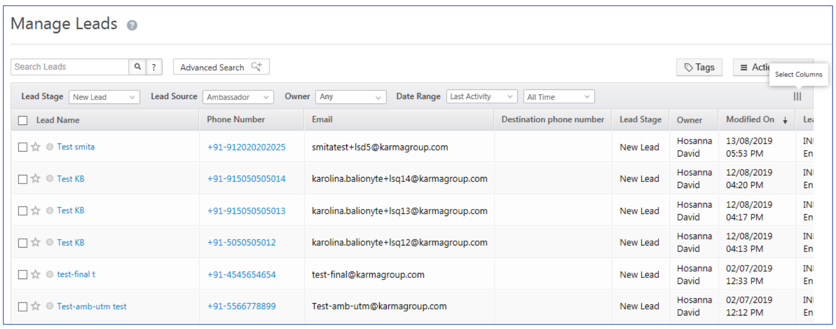
- Organic Search
- Referral Sites
- Direct Traffic
- Social Media
- Inbound Email
- Inbound Phone Call
- Outbound Phone Call
- Email Marketing
- Pay per click Ads

These lead sources are relevant to most businesses. You can however add your own lead sources.

MANAGE LEAD

Manage Leads

The *Managed Leads* window allows you to update the list of leads based on criteria defined by you



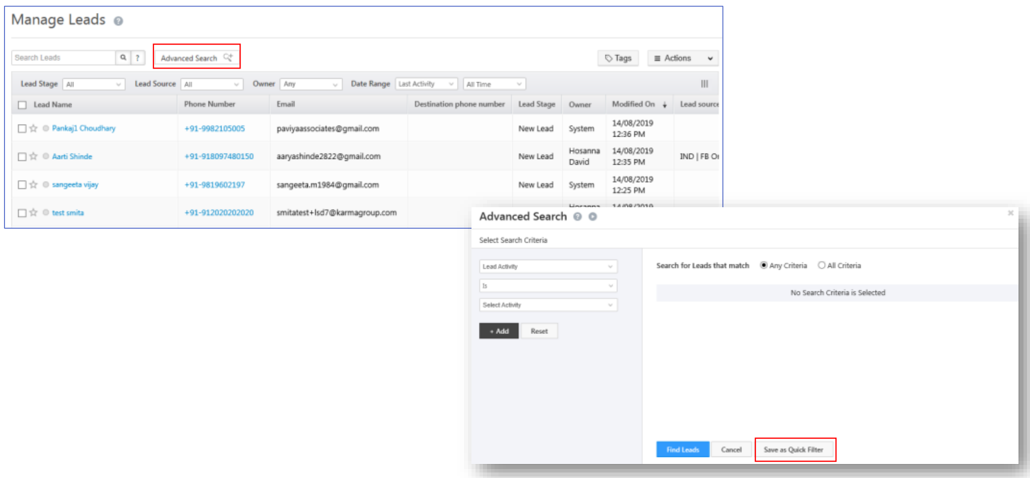
You can also add and delete the other columns in the Manage Lead grid view by clicking on Select Columns icon.

From this page as a user, you can do following actions:

- Filter leads
- Create New Fields
- Import Leads
- Create Lead List
- Advanced Lead Search

We will cover all of them one by one in coming few slides.

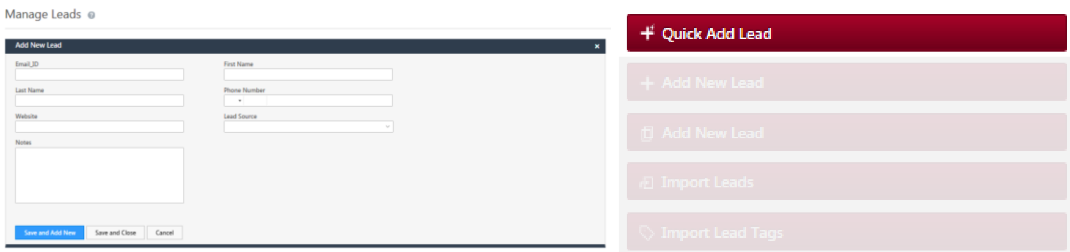
Manage Leads – Advanced Search



While Manage Leads page allows to search leads based on four parameters combination: Lead Stage, Lead Source, Owner and Date Range

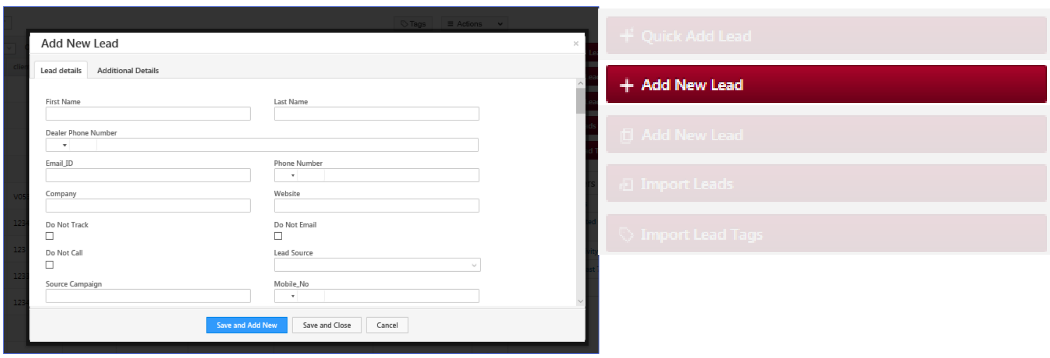
Advanced Search allows to do implement multiple criteria with and/or combination. The search criteria could also be saved as Quick Filter which allows you to access the search criteria defined immediately.

Quick Add Lead Button



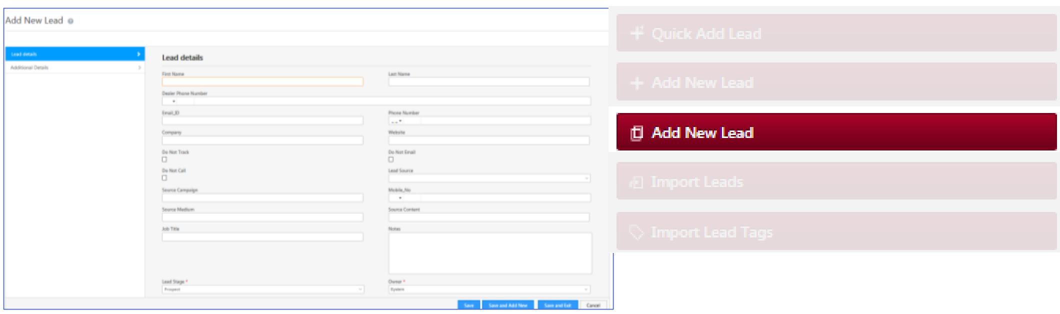
By Clicking on Quick Add Lead button, the system will open the Lead form right above the list of the leads with basic fields allowing the end users to add the leads with minimum required information.

Add New Lead from the same window



By Clicking on the highlighted button, LeadSquared system will open a pop-up window which will allow the Sales User to add leads with detailed information.

Add New Lead from new window

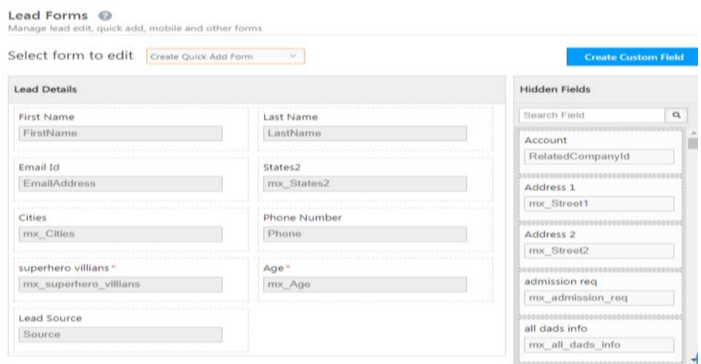


By Clicking on the highlighted button, LeadSquared system will open a new window which will allow the Sales User to add leads with detailed information. It is like the previous action button except that it will open the add leads page in new window, thus allowing the Sales User to work with Manage Leads page at the same time as adding the new leads.

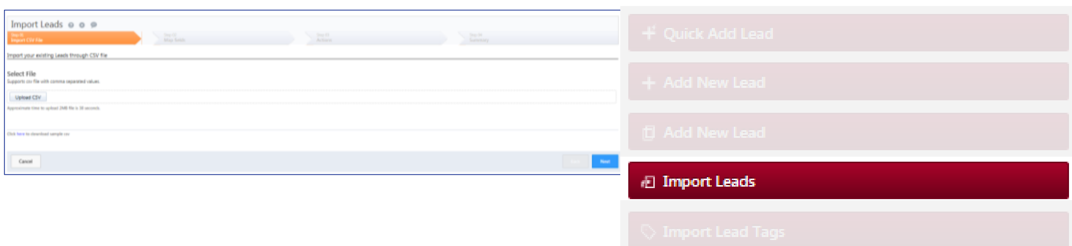
Lead Forms

You can customize the various Lead Forms and add or remove the Lead Fields as per your Requirement

- Lead vCard
- Quick Add Lead Form
- Add New Lead Form



Import Leads

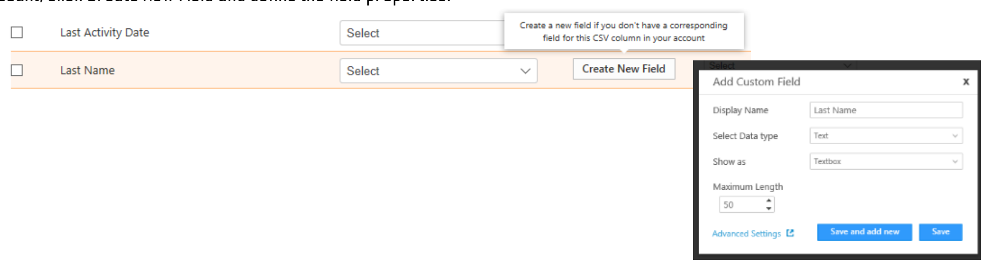


The Import Leads button, allows the end user to import the leads from the CSV files and mapping the CSV fields with the fields in LeadSquared Lead fields. This functionality comes handy if you must bulk update to the Leads.

Import Lead Steps

Step 1: Import the CSV File

Step 2: Map the CSV file columns with LeadSquared Lead Fields. If a field in your CSV file doesn't exist in your LeadSquared account, click Create New Field and define the field properties.



Step 3: Define how to handle the duplicate leads in the CSV file. If a CSV file contains a lead with an email address that already exists in your LeadSquared account, the lead is a duplicate.

Pre- Requisite: Do maintain the column names in the CSV files before importing.

Step3: Advanced Settings:

Handling of duplicated while importing CSV file:

Ignore duplicates

If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.

Overwrite duplicates

If you select this option, the CSV file data will overwrite the data in your LeadSquared account. The following checkboxes will also be available for selection

Import only if valid email exists in CSV

Do not update owner of existing leads

Do not create new leads – this will ensure leads are only updated and no new leads are created.

Update empty fields of duplicates

With this option, only empty fields of the duplicate records in LeadSquared will be updated with the data in the CSV file.

Uncheck the **Import only if valid email id exists in CSV** if you want to import leads with invalid email addresses as well.

Select List and Owner

- By default, the logged in user is displayed as the lead owner. You can change the lead owner from the drop-down.
- You can assign the leads to a list you've created, or you can create a new list. If you want to create a new list, enter the list name and a description.

Note: When you create a new list, it gets created as a **Static List**.

Data Formats

- You may encounter some of the following situations – When your CSV files contain date fields, example 'Contacted On', 'Followed Up On', 'Birthday', and so on, you should ensure that you've created a matching custom field in your LeadSquared account.
- If your CSV file contains a field which can be represented through a drop-down, you could create a matching custom field to map it to during the import process.
- If the CSV file contains a lead field of type 'Boolean', you can create a matching custom field and then map the information during the import process. If the field is empty then, by default it is mapped as 'NO' in LeadSquared.
    - For example, you may create a lead field for 'Valid Passport'. If a lead in your CSV file has an empty value for this column, it will get mapped as a 'No' in your LeadSquared account.
- If your CSV file contains a field for 'Do Not Email' you can map it to the 'Do Not Email' field in your account.

Please Complete Exercises

Open the Step-by-Step Exercise document from
https://myleadsquared.sharepoint.com/:b:/s/LeadSquared_Training/ESFd3Du3TttDvjCX_j4LqVcBU39Cvh7N7OoUDTS5bpXuGg?e=AyMTd5
and complete till chapter 7

x

THANK YOU!