priority

CRM for Sales Reps Script

Clip Link: http://www.eshbel.com/Movie_Search/CRM_for_sales_reps_clip.htm
Note: Yellow highlights indicate action instructions.

Introduction (00:00-00:44)

This clip demonstrates the tools available to sales representatives who need to view and update sales and CRM data in real time. We're going to demonstrate working with these tools in each of two different interfaces: a rich Silverlight-based interface that runs on your web browser when working on a desktop computer and a basic HTML interface for when you're on the go, whether working offline on MS-Outlook or working from a mobile device such as your iPhone or Android phone.

Note that a separate video is available for corporate executives who need to track and analyze sales data and assess sales rep performance.

Priority on Outlook (00:45-03:55)

Let's begin with a look at some of the ***Priority*** tools that can be accessed from Microsoft Outlook, widely considered to be the standard e-mail and calendaring application.

Begin by setting up the desired add-ons in ***Priority***. From the top bar, open the **Mail** menu and select **Priority on Outlook**. To set up CRM data, select the Add-ons tab and flag the **Customer Relations** option.

You can now access the data in Outlook and click through the various tabs to access important data regarding tasks, customers, contacts, leads, sales opportunities and price quotes that have been recorded in the system.

Let's look at sales opportunities. Each sales opportunity traces a specific potential customer in a specific marketing campaign. First of all, you can set up the tab to automatically display only those records that meet a designated set of criteria, for easy reference, by selecting **More**…. For instance, you can change the start and end dates of the report, retrieve sales opportunities opened for a specific customer and limit results to opportunities that are currently being handled.

Within the report itself, click the date to activate a form in which you can view and update detailed information regarding the record in question.

Click any of the provided links to view still more data, for instance, customer details. The form that opens displays additional data for the customer in question and can also be used to modify customer data or to access additional tasks or sales opportunities that were opened for the customer. If a valid address is defined for the customer, you can also view a map of the address in Google Maps. You can even send a link to the customer record in an e-mail.

Priority on a Mobile Device (03:56-04:54)

These same tools can also be accessed from your iPhone or other mobile device, providing you with full access to CRM data when and wherever you need it. For example, say your assistant sets up a meeting for you while you're away on a business trip. An e-mail notification will be sent directly to your iPhone letting you know about the meeting. Clicking the link in the e-mail message will allow you to view the appointment details, access the customer's contact information and click the customer's phone number to call and let them know when you're on your way. Once you arrive, you can enter your meeting notes into the database directly from your phone, and even update the associated sales opportunity.

Synchronizing Appointments, Contacts and To-Do Items with Microsoft Outlook (04:55-09:20)

Outlook synchronization is another powerful feature that can greatly boost efficiency. The e-mail messages you send and receive contain a great deal of valuable CRM data. The benefits of aggregating this information within ***Priority*** and linking it to the corresponding system record, such as a specific customer, are readily apparent, provided this can be accomplished quickly and effectively.

Before you begin, make sure that the workstation on which you run Outlook has updated ***Priority*** data, such as customer numbers. You can set up periodic updates for this purpose, to be performed automatically each time you log in to ***Priority***.

Priority's bilateral interface with MS-Outlook enables you to easily create new tasks and service calls based on Outlook e-mail messages, and to import customer and vendor contact information from Outlook to ***Priority***. The synchronization mechanism can also be set up to synchronize calendars and/or update Outlook tasks based on your To-Do list in ***Priority***.

Once you have completed the initial setup and defined all the necessary parameters, the synchronization mechanism can operate automatically in the background, at predefined intervals.

Many synchronization parameters can be defined in Outlook itself, even while working in offline mode. Right-click any message in Outlook and select **Synchronize with Priority**. Then select the parameters you desire.

Using Outlook's Field Chooser, you can add columns to Outlook based on any of the parameters used for synchronization with ***Priority*** and use these columns to update synchronization parameters for each item in Outlook. For instance, when you receive a message from a contact that works with several different customers or, perhaps, has not yet been linked to *any* customer, you'll need to choose the customer to which the message will be linked during synchronization. Note that the Choose list provided for this purpose is automatically populated with the relevant ***Priority*** records. Finally, make sure that all messages to be synchronized with ***Priority*** are flagged as such.

While synchronization will also be run automatically, let's just quickly run it manually and then open the **Tasks** form to view the tasks that were added or updated as a result.

As you can see, the e-mail message has been imported as a task, together with its attachment. You can also update existing contacts or tasks in Outlook based on the data in ***Priority***, or use these data to create new contacts or tasks.

Leads (09:21-10:47)

Moving on, let's have a look at ***Priority***'s web-based interface, which utilizes Microsoft's Silverlight technology. We'll start by opening the **Leads** form, which is used to update and manage leads from a variety of sources, such as marketing events, Internet sites, direct mailing or word of mouth. Leads can be created automatically from an e-mail message, using the synchronization method demonstrated earlier, or they can be recorded manually.

Use the **Leads** form to record general details such the lead's first and last name, their job title and the company in which they work and their contact details. If the lead is associated with an existing customer, you can assign the relevant **Customer**; otherwise, he or she should be assigned to the predefined Leads customer. You can convert a qualified lead into a potential customer at a later stage, if needed.

You can also indicate the lead's source and link it to a related marketing campaign. If the lead in question is referred to a Value-Added Reseller (or VAR), select the relevant reseller and VAR contact.

Customers (10:48-12:55)

Next, we'll open the **Customers** form and show you how to use this form as a launching point from which to access relevant data, and engage your customer.

Use the different sub-levels of this form to view and/or update the customer's contacts, tasks, sales opportunities and more (form navigation is explained more fully elsewhere). These sub-levels, and indeed, the form columns themselves, can be arranged as you see fit, using built-in user-level design tools, as explained elsewhere. A variety of help features can be accessed from within the interface itself, using either the mouse or the keyboard; a full list of help options is available elsewhere.

Once you have set up the necessary data and infrastructure, you will also be able to contact the customer directly from the relevant customer record. Move the cursor to the **E-**

mail column and click the message icon to begin composing a pre-addressed e-mail to the customer. You can also access additional commands enabling you to dial the customer's phone number using Windows Phone Dialer, send an instant message using Windows Live Messenger, or contact the customer via Skype. You can view the customer's address on Google Maps at any time, by selecting the **Map** option from the upper **Run** menu.

You can also easily locate the specific customer contact whom you wish to contact, based on their position within the customer's organization. Simply select the **Organizational Chart** report from the list of Direct Activations to view the entire organizational hierarchy for the customer, on all levels, together with the customer contacts that fill each position.

Tasks (12:56-15:14)

As we have already seen, tasks that are recorded in ***Priority*** can be linked to specific customers and their contacts. You can also set up a list of tasks that are generally performed together, as part of a standard process. This check list is linked to a relevant task code, such that tasks are opened automatically based on the check list whenever that task code is assigned to a task. Let's see how this plays out when a new task is opened and assigned the relevant task code.

As you can see, the list of tasks we set up have also been opened automatically and assigned the designated status. You can modify this list from the sub-level form, adding or canceling tasks as needed, or access a particular task to edit it. Each of these sub-tasks will need to be completed before the main task can be flagged as **Done**.

If several employees will be collaborating on a given task, click the **Participants** tab to list any participants or groups with whom they want to share this task. This makes it easier to keep all of the participating users up to speed on any developments. Additional details on creating and managing collaborative tasks are provided elsewhere.

You can also attach relevant files to the task. You can browse to any local or network file to import it, or copy the file directly from the Windows Explorer or even from an e-mail.

This and other document management tools enables you to store your files securely on the ***Priority*** server, ensuring that users who need access to the file can locate it quickly and easily, when and wherever they need to. Additional details on ***Priority***'s document management tools are provided elsewhere.

Sales Opportunities (15:15-22:52)

By linking the customer task to a specific marketing campaign, a sales opportunity automatically opens for that customer and campaign.

If this opportunity is being managed by a distributor and you expect to receive the actual order from the distributor rather than directly from the customer, make sure to record the name of the distributor in the **Customer** column. You can then record the name of the end customer in the designated column. If the distributor is working in conjunction with a value-added reseller, select the desired reseller and VAR contact.

You can now proceed to record preliminary information for the sales opportunity, such as projected end dates. You can also assign up to two sales reps to follow up the sales opportunity. If relevant, you can specify the source of this opportunity in the **Source of Opp** column.

If desired, click the **Add'l Details** tab and assign the opportunity a **Sales Opp Type** and/or **Add'l Sales Opp Type**. Or record a major competitor for this particular sale.

Now click the **Prices** tab. If you want prices to be taken from a particular price list, specify the **Price List Code**. To restrict the items that can be included in the opportunity to parts that appear in this price list, flag the **PriceList Parts Only** column.

Finally, click the **Last Task** tab and indicate the relative **Urgency** of this sales opportunity. Note that the **Next Contact Date** is updated automatically, based on the contact frequency defined for opportunities with this degree of urgency and the date of the last recorded task, unless a later date has already been recorded in this column. In any case, it may be revised.

Enter the **Parts in Sales Opportunity** sub-level form. Record each part for which the sales opportunity has been created as well as its **Quantity**. If you set the price list for this sales opportunity, prices will be taken from there but may be revised. Note that the **Projected Revenue** from the potential sale of the part is calculated automatically, by multiplying the **Unit Price** by the **Quantity**.

Return to the upper-level form. Click the **Prices** tab to check the total **Projected Revenue** for all parts and **Weighted Revenue**, which is based on the odds of closing defined for the opportunity's current status. In the current example, a sales opportunity that has reached the X status is considered to have X percent chance of generating an actual sales order. The odds of closing also determine whether a given sales opportunity is taken into account in sales forecasts and in calculating compliance with targets. You can set a special system constant to define the minimum odds of closing that is needed for this purpose.

In the sales opportunity itself, you can also record the **Manager's Estimate** of the monetary value of the potential sale. If the opportunity is successful, it can be linked directly to one or more price quotes and sales orders. Subsequently, the numbers of these documents will appear in the corresponding columns of the **Sales Opportunities** form. If the sales opportunity does not pan out, you can use this form to record the **Reason for Failure**.

Finally, you can create a copy of a sales opportunity and then revise it as necessary. For instance, say you receive an order for part of the items listed in the sales opportunity, and expect to receive a second order for the remainder. Simply select **Copy Sales Opportunity** from the list of Direct Activations in order to create a copy of the sales opportunity and then revise that copy so that it reflects the items and quantities for which you still expect to receive an order. You can then revise the items and quantities in the original opportunity to match the received order and close the original opportunity.

You can use the **Details of Open Sales Opps** form to view all active sales opportunities that have been recorded, for instance, for a particular part. You can then track their progress through their status and see revenue that is projected for each one.

Priority also allows you to pre-define a check list of tasks that will be opened automatically for any sales opportunity recorded in a given marketing campaign, based on the status of that sales opportunity. For instance, in the "General" campaign, a task will be opened to initiate a phone call when the sales opportunity is first opened and assigned the Initial Contact status. Once the sales opportunity reaches the In Progress status, a task will be opened to contact the customer by e-mail as a followup, and so on.

Any tasks that have been opened for the marketing campaign appear not only in the **Tasks** form, but also under the campaign itself, where they can be updated as necessary.

This concludes our overview of the CRM tools available to sales representatives.

Related Documentation

- CRM for Executives clip
- Office Connectivity clip
- CRM Wizard > "Synchronize appointments, contacts and to-do items with Outlook"
- Collaboration clip
- Document Management clip
- User Interface Guide
- Navigation clip
- Form Design clip
- Learning Aids clip