

## Background

The company was experiencing a problem where leads were getting lost, and the wrong leads were being prioritized. This was causing the sales team to miss out on potential business opportunities and resulting in lost revenue. The company recognized that they needed a better system in place to manage their leads.

## Solution

The company decided to implement a lead process in their CRM. They started by creating rules based on HQ state, and depending on which sales rep had that state, the lead would be assigned to them. However, this did not completely solve the issue as reps were still not contacting the leads. To address this, the company added a rule where if a rep did not contact a lead within 24 hours, their manager would receive an email notification.

Next, the company added a contact us form to their website that linked directly to their CRM. They also added a few fields that they could use to label their leads. The leads that came in through the website form were labeled as "web inquiry" and were considered to be the company's lowest hanging fruit. The sales team was expected to contact these leads on the same day that they came in.

To further prioritize leads, the company linked their marketing system to their CRM and started assigning points to their leads. The points were based on factors such as the lead's job title, the number of times they visited the company's website, and their behavior on the site (e.g. downloading a file). When a lead accumulated 20 points, they were sent to the sales rep in their territory. These leads were labeled as "sent from marketing" and the sales team was expected to contact them within three business days.

If a lead indicated that they were not interested in the company's product, the sales team would send them back to marketing and reset their points to zero. However, if the lead continued to interact with the company's website and accumulated another 20 points, they would be sent back to the sales team. The company also had leads from conferences that they would nurture until they were ready to engage.

## Results

After implementing this lead process, the company did not lose a single lead unless there was a server issue. The process helped the sales team to prioritize their leads and ensured that they did not miss out on any potential business opportunities. It also helped the company to identify leads that were not interested in their product and allowed them to focus their efforts on more promising leads.

## Conclusion

By implementing a lead process in their CRM, the company was able to overcome their lead management challenges and improve their sales performance. The process helped them to prioritize their leads and ensure that they were contacted in a timely manner. As a result, the company was able to increase their revenue and improve their overall business performance.