

Learning Objective

This is the first module of the
LeadSquared Product Training 101

In this module, we will...

- Understand leads and other terminology used in LeadSquared.
- Comprehend Sales Lifecycle
- Get an overview of LeadSquared
- List down our clients and industries we cater to
- Understand the business use case for our leadsquared training



Lead Introduction

First thing first, let's understand the common vocabs of LeadSquared and business process.

What is a Lead?

In simple terms, a lead is an individual or organization with an interest in what you are selling.

Does everyone who enquires about your product will be an ideal lead?

SET YOUR CUSTOMER PERSONA

Age Group

City

Job Level

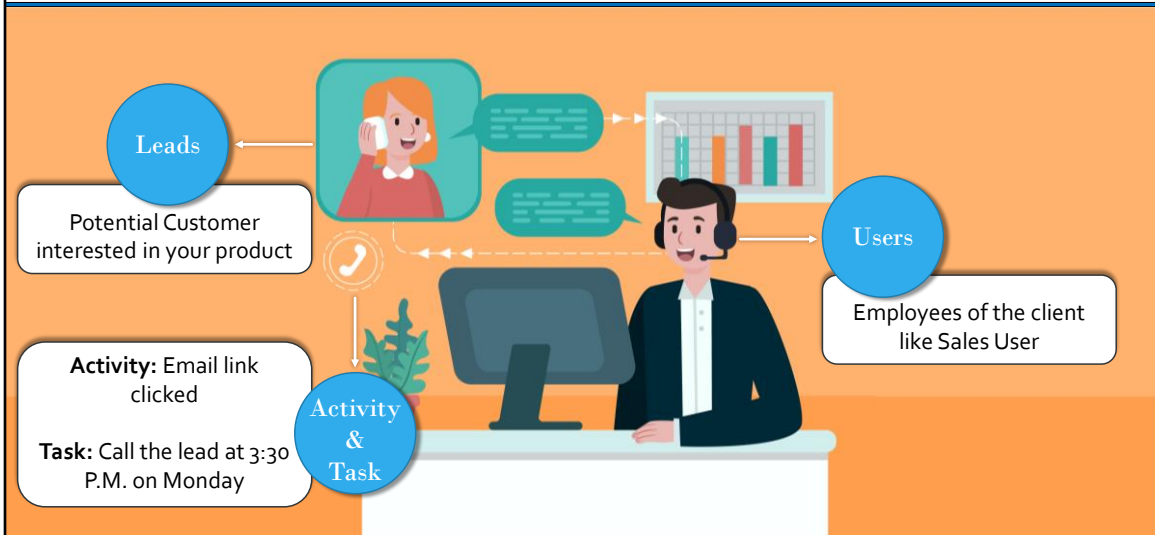
Earnings (p/a)

→

LEADS	QUALITY SCORE	QUALIFIED
	8/10	<input checked="" type="checkbox"/>
	3/10	<input type="checkbox"/>
	5/10	<input type="checkbox"/>
	9/10	<input checked="" type="checkbox"/>
	4/10	<input type="checkbox"/>

Leads could be any potential buyer of your product immediate or in future. However, there are different kind of people who would show interest in your product out of which probably of some set of people becoming customer are higher as compared to other set of people. For example: Probability of youngsters within the age group of 20 to 30 have more chances of buying a Sports Bike when compared to people within the age group of 40 to 50.

Leads, Activities, Tasks and Users



Activities are different Action points or Steps to complete the business flow. For example: Follow Up

Tasks are the detailed actions that needs to be fulfilled to mark an Activity as complete. For example: Call the customer at 3:30 P.M. on Monday. With tasks you can setup reminders too.

Users are the individuals who work on LeadSquared like the Sales User, Admin etc. They are the employees of the clients who bought LeadSquared.



In sales, there are two different strategies that help businesses understand, plan and implement lead conversion. These are the traditional sales funnel and the lifecycle marketing method. While some aspects of these strategies are similar, they follow a unique structure and purpose of their own.

The lifecycle marketing model is customer centric. It factors in the entire experience a customer has from beginning to end, rather than just the sales-oriented data.

The sales funnel method begins much the same way but follows leads through a more analytical account of data and strategy. It factors in the changing of the customer's mind between the initial lead stage, interest in a brand, the researching of the brand, and the final decision-making to purchase.

Lifecycle marketing is often used by those wishing to improve customer service within their brand. It helps businesses discover new ways to improve the customer experience, create long-term returning customers, and foster brand loyalty.

Sales Funnel



Sales Funnel starts with Awareness, followed by Interest resulting to Decision and finally the Action. The entire focus of Sales Funnel is Sales, that is, to convert a prospect to customer. Let's understand what happens in these stages.

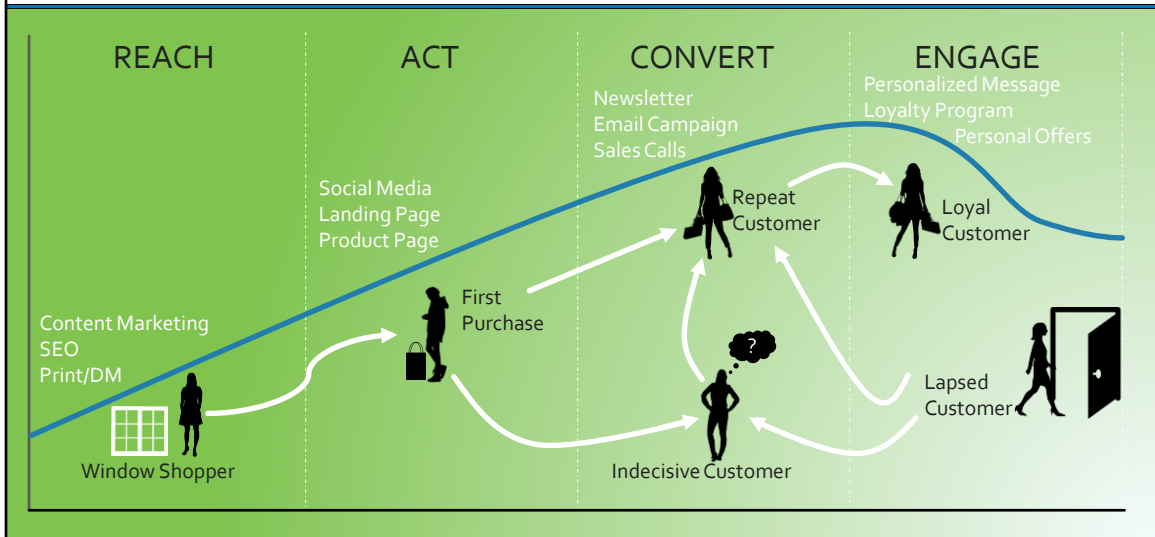
Awareness: It is the starting point where in the customer or prospect becomes aware of your product/services through any of the channel you decide to market your product/services or via organic search. The awareness stage is where in the marketer uses different marketing strategies to make the target customer aware of the product/services and features of the same via content development, SEO, social media marketing, paid advertising, email campaign, SMS campaign and other approaches.

Interest/Research: Now that the prospects are aware of your brand/product/services through different marketing strategies you adopted, you may have piqued their interest. It is at this stage they would like to know more of your products thus, you provide the consumers with information and tools to learn more about the company via FAQs, custom content, new forms of information via live videos, apps, trail accounts etc.

Decision Making: While some consumers who were prospect by now may have already gone to the action stage and became your customer but there are some who needs a little push from time to time to reach the final stage. Lead Nurturing is part of this stage where in the leads are nurtured via Drip Marketing, exclusive promotions, free consultations by the Sales Reps and so on to finally reach the action stage.

Action: The end of the funnel is the action stage where in the lead becomes your customer. But does the sales funnel end here? No, the challenge is to make them return to you in future too.

Lifecycle Marketing



The focus of the LCM framework is to inspire lead conversion by focusing on the customer, not the sale. In Lifecycle Marketing consumers are not seen as a Sales number but more of a partner with your product for long term which is why Lifecycle Marketing is also known as the customer journey.

Reach: Much like Sales funnel but with more customized marketing approach for each consumer. The first level of the lifecycle marketing method is same as the Sales Funnel where in consumer discovers a brand or product or service via different marketing approach like SEO, Social Media, Content Marketing etc.

Act: This is the combination of research and decision-making sections of Sales Funnel. Based on the information gained by the consumer they make the first purchase. This is where the leads turn into customer.

Convert: This is where the marketing approaches converts the first timer to repeated customer with Newsletter, Email Campaign and Sales Calls. With such marketing approach Indecisive Customer is also targeted with an attempt to convert them also into Repeat Customer.

Engage: During this stage, the approach is to convert the repeated customers into Loyal customers via Personalized Messages, Loyalty Program and Personal Offers. With continuous engagement approaches Lapsed Customer is also targeted to convert them into Repeat Customer or Indecisive Customer then to Repeat Customer.

What is LeadSquared?

LeadSquared is the Lead Conversion Platform built to support and enable your organization for effective Sales Conversions and Marketing output.



Sales Execution + CRM:

- Captures leads from all online and offline channels
- Can automate lead distribution to relevant salespeople
- Can Qualify and prioritize leads based on their profile, actions and behavior
- Can configure next best step in the sales cycle for the sales team assigned to a lead
- Can configure reminders to follow up a lead ensuring sales people do not miss out any opportunity
- Can create custom report to monitor what matters the most to the client

Marketing Automation

- Capture Leads from offline and online sources
- LeadSquared system allows the marketing users to send relevant content right when users want it to encourage sales actions
- With 360-degree user profile, behavior, activity + social tracking and more LeadSquared system allows the users to understand the intent of the leads
- Identify a user's intent to buy with tracking and trigger engagement actions
- Across all channels and devices – emails, text messages, social, phone calls, portals and more Marketing users can trigger engagement with the leads via LeadSquared

system

- LeadSquared system provides prescriptive insights across lead sources, engagement campaigns, user journeys and more with the help of reports to measure the performance

Lead Conversion Platform

- Combines the power of Marketing Automation, Sales CRM and Machine Learning. With this package, clients get Marketing Automation, Sales CRM and Conversion Prediction capability of the LeadSquared system.
- Conversion prediction uses the principles of machine learning to predict conversion chances of every lead. It collects all the historical data and finds correlation between lead attributes that impact conversion outcome. The system is set up to pick impact attributes from historical data, learns from it and creates the prediction model. New leads are fed into the model to predict the conversion chance that is presented to sales and marketing users as – high, medium or low.

Marketing Automation Plans

Essential

10,000 contacts

Lead Scoring

Email Campaigns

Landing Pages

API

Basic

10,000 contacts

All in Essential, Plus

Automation Workflows

Website Tracking

Website Widgets

Standard

50,000 contacts

All in Basic, Plus

Rules & Notifications

CRM Integration (\$)

Webhooks

Enterprise

200,000 contacts

All in Standard, Plus

Contact Center Integration

Custom Web Events

Split Testing

Developer Support

Sales + Mobile CRM

LITE

10,000 contacts

Email Integration

Lead Tracking

Mobile CRM

Lead Qualification

User Roles

Lead Scoring

Developer API

Sales Tracking

Email Support

Trackable Sales Email

PRO

100,000 contacts

User Groups

All in Lite, Plus

Custom Tabs

Email Campaigns

Custom Actions

Lead Distribution

Webhooks

Rules and Notifications

Phone Support

SUPER

200,000 contacts

Visual Workflow Builder

All in Pro, plus

Dedicated Account Manager

Permission Templates

Marketing vs Sales

Marketing

- Charged as per the no. of Contacts
- Lead Capture mostly used methods: Landing Pages, Website Tracking,, Social Media, Emails, SMS and Lead Marketplace
- Key features of Marketing product of LeadSquared are Email Campaign, Landing Pages, Marketing Automation and Marketing Reports

Sales

- Charged as per the no. of Users
- Lead Capture mostly used methods: Manual and Integration via API
- Key features of Sales product of LeadSquared are Sales Group Hierarchy, Sales Tracking and Lead Qualification

Our Clients



Industries



Education



Healthcare



Travel &
Hospitality



Finance



Real Estate

LeadSquared primarily cater to:

- Higher Education
- Education Tech
- Career Schools
- Insurance
- NBFC (Lending)
- Banks
- Real Estate
- Healthcare
- Travel and Hospitality



Billing and Usage Demo

Business Case – S.H.I.E.L.D Insurance



Health
Insurance

Life Insurance

Third Party
Insurance



Consider this, Marvel S.H.I.E.L.D has decided to launch its insurance service to all the superheroes where in they will be offering following products:

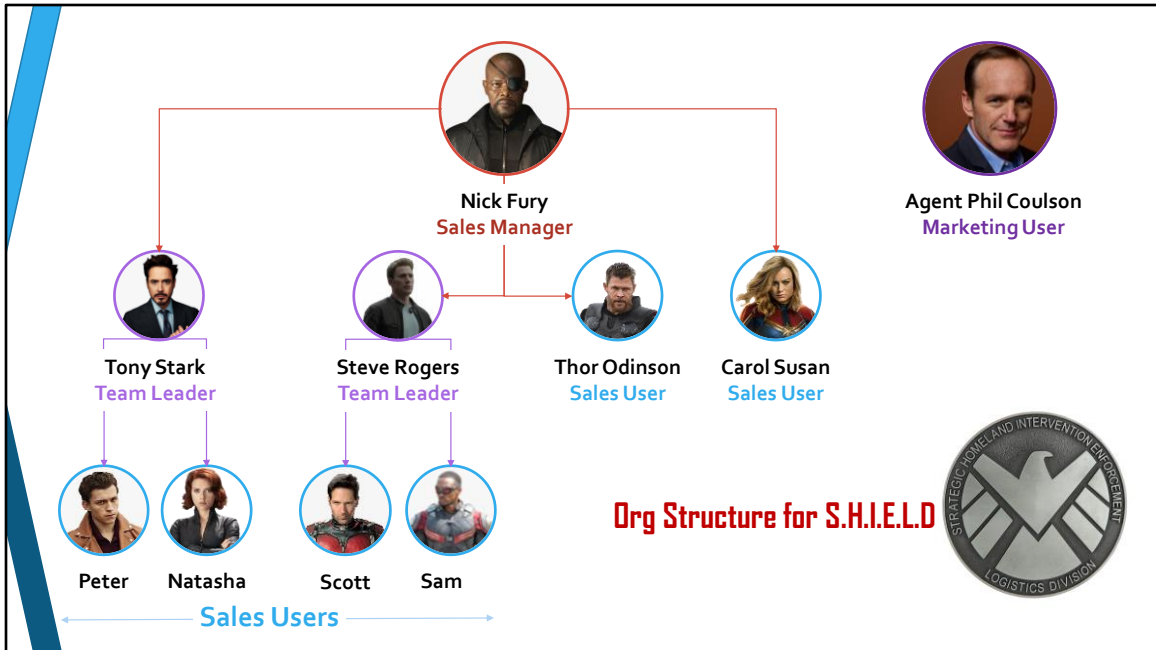
Health Insurance. Not that they need it, but it covers their family members too.

Life Insurance. Considering they put their life in danger for saving the world, it seems to be only sensible to have a life insurance

Third Party Insurance, where in it will cover all the damages caused by them to the city during the rescue operations like what happened in New York when aliens attacked with the help of Loki.

S.H.I.E.L.D has their own set of team who handles various tasks of selling and onboarding the superheroes to these offerings.

Let's look at the org structure and understand their responsibilities.



Nick Fury is the Sales Manager who is overseeing the entire Sales. Tony Stark and Captain Steve Rogers have their own team of Sales Users who will be converting the Leads into customers.

Tony Stark aka Ironman who is the team leader has Peter Parker aka SpiderMan and Natasha Romanoff aka Black Widow in his team.

Steve Rogers aka Captain America has Scott Lang aka Ant Man and Sam Wilson aka Falcon in his team.

Thor Odinson and Carol Susan aka Captain Marvel are also the Sales users, however they work on High Priority leads.

Agent Phil Coulson is responsible for Marketing the products & offerings of S.H.I.E.L.D.

S.H.I.E.L.D Insurance Firm – Business Process



Agent Coulson, promotes the services of S.H.I.E.L.D. via email campaigns, facebook ad campaigns and is responsible for maintaining website of S.H.I.E.L.D. Through his campaigns and landing pages, Leads are captured into LeadSquared.



Tony and Steve as team leaders looks after their team of sales users. They need complete view of the leads handled by their respective teams only. They also verify the Sales done by their teams.

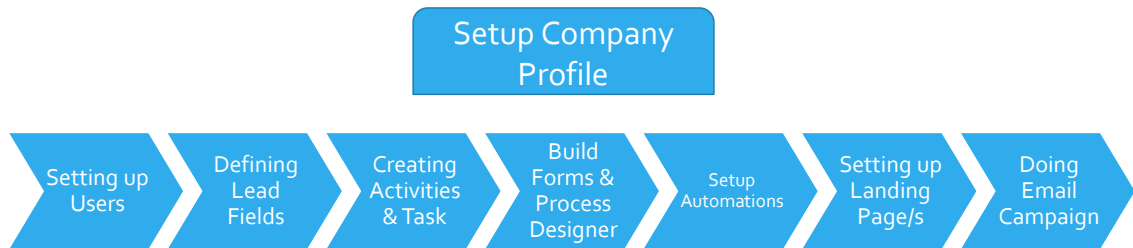


Thor and Carol Susan works only on the high priority customers who has Lead Quality Criteria more than 6 which is calculated based on the Superhero Powers each of the leads has. Thus, they are assigned leads accordingly



Non-Priority Leads captured in LeadSquared will be auto assigned to the users based on the availability. Sales Users will be calling these leads and trying to convert them into customers. They capture Calls in Call Disposition, Collect Documents and finally Sales information is captured.

Building LeadSquared Solution for S.H.I.E.L.D.





Thank You!

You have successfully completed the 1st Module. Please move to the next module: **Basic Setup and Concepts**