
leadsquared
LeadSquared for Sales
Product Training 101 | By Peeyush Pavanan

Learning Objective

This is the third module of the LeadSquared Product Training 101

In this module, we will…

- Working with Leads: Lead Capture, Lead Stages, Lead Distribution, Lead Score, Lead List and Smart Views, Lead Forms, Lead Prioritization
- Activities: System and Custom Activities for Sales
- Sales Activity
- Tasks
- List
- Forms & Process Designer
- Process Automation
- Sales Reports

Lead Capture

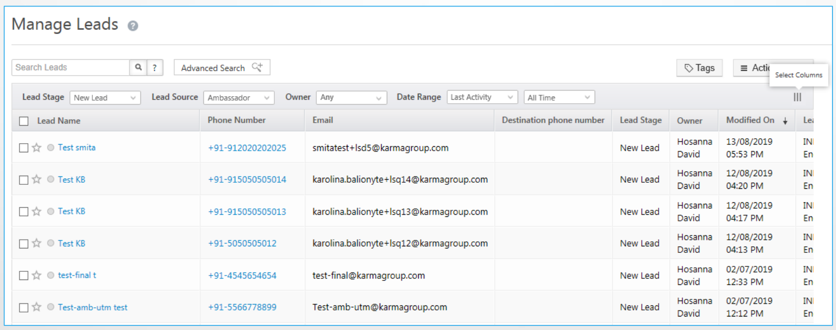
Ways relevant for Marketing

Capturing Leads

Manage Lead

Manage Leads

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



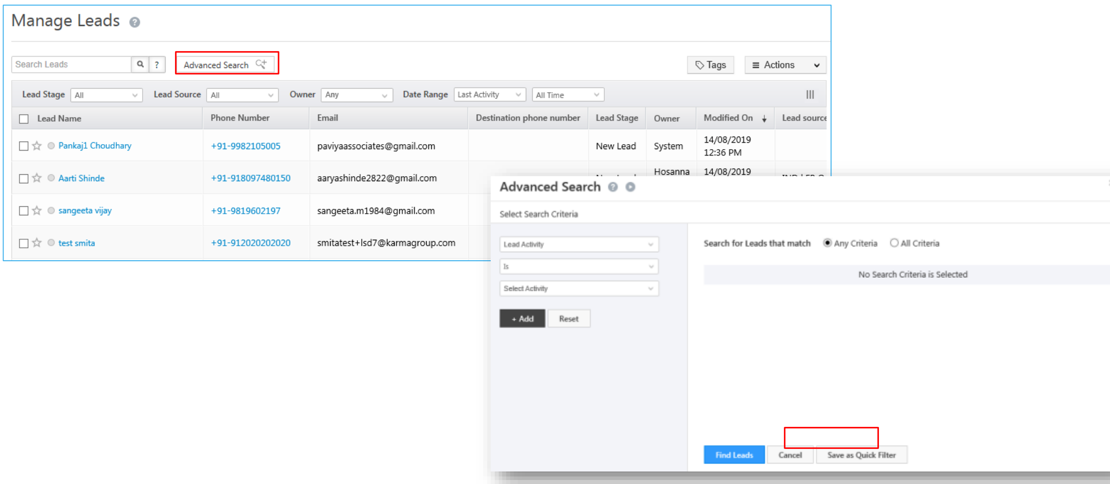
You can also add and delete the other columns in the Manage Lead grid view by clicking on Select Columns icon.

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.

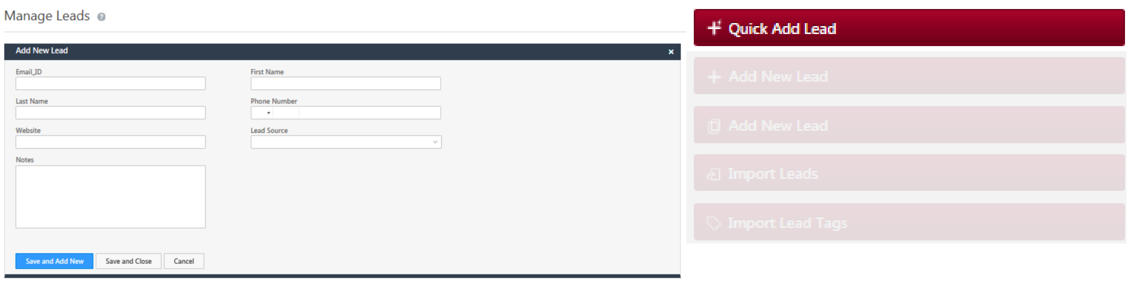
Manage Leads – Advanced Search



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

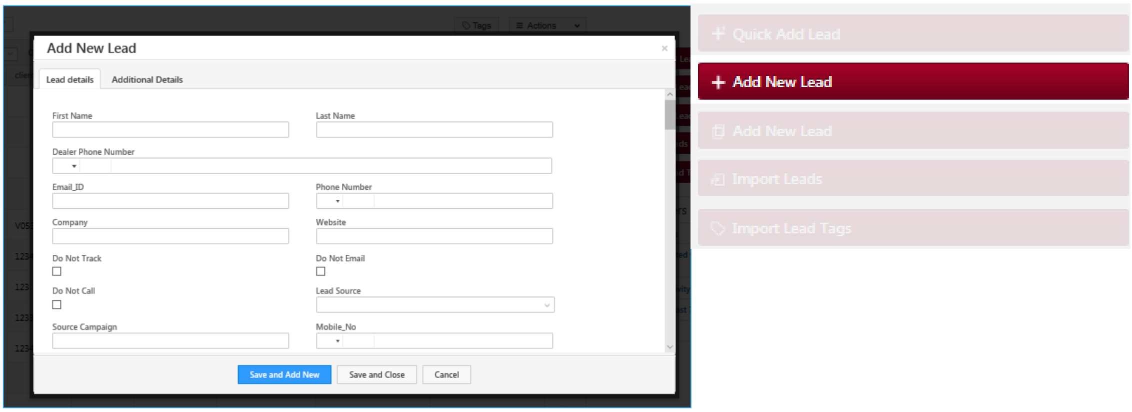
Advanced Search allows to do implement multiple criteria with and/or combination. The search criteria could also be saved as Quick Filter which allows you to access the search criteria defined immediately.

Quick Add Lead Button



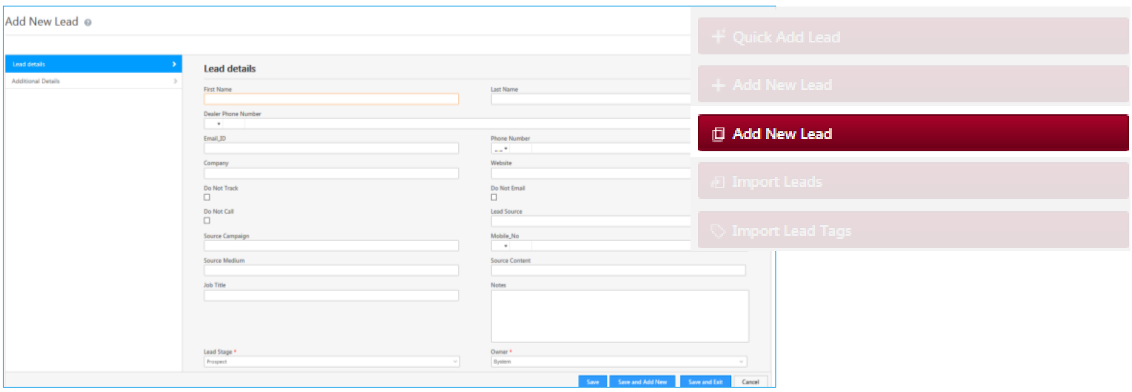
By Clicking on Quick Add Lead button, the system will open the Lead form right above the list of the leads with basic fields allowing the end users to add the leads with minimum required information.

Add New Lead from the same window



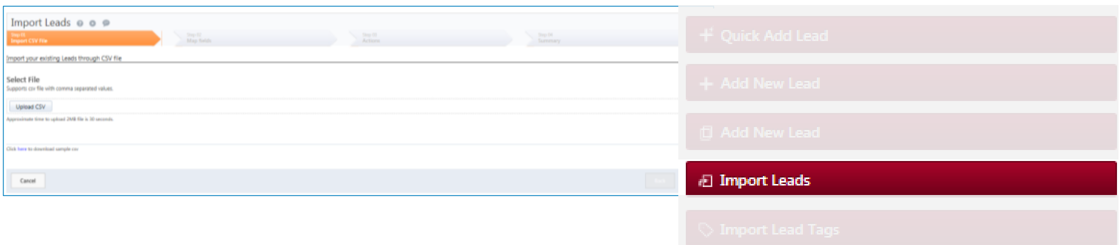
By Clicking on the highlighted button, LeadSquared system will open a pop-up window which will allow the Sales User to add leads with detailed information.

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.

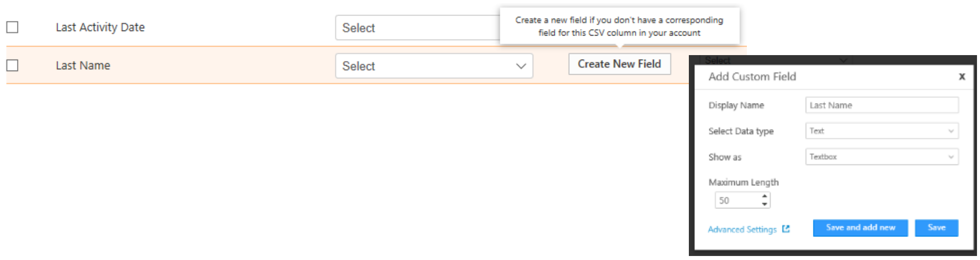
Import Leads



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 and define the unique Lead fields, for ex: Email ID. 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. In case the Unique field is anything other than Email address then the system will define duplicacy based on that field value

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.

Lead Prioritization

Types of Scores in LeadSquared

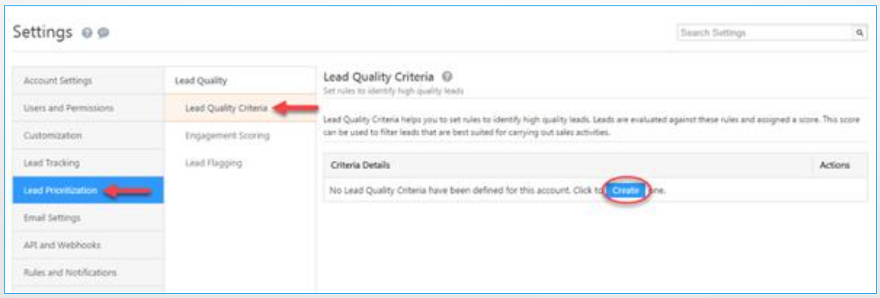
There are three types of scores in LeadSquared, each giving specific information to the users.

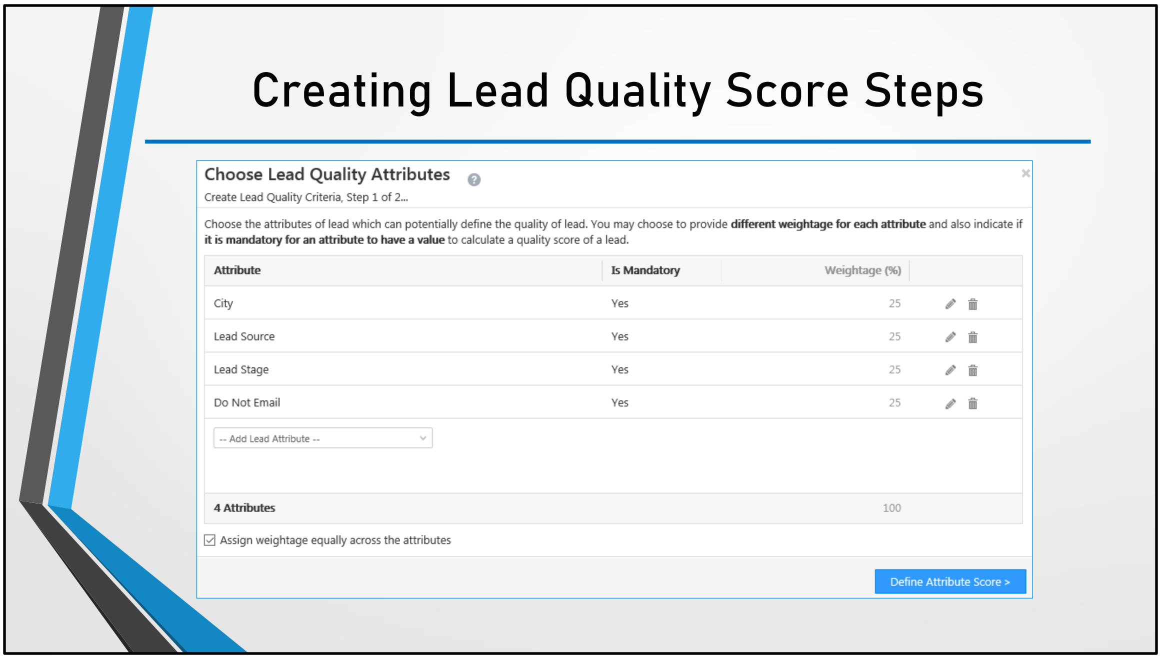
1. **Lead Quality Score**: Defining the quality of the leads based on certain rules relevant for business.
2. **Lead Score**: Defines the lead's performance based on different activities lead has been involved in, like email open, inbound call etc. It is applicable for all leads based on various scores 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.

Lead Quality Score

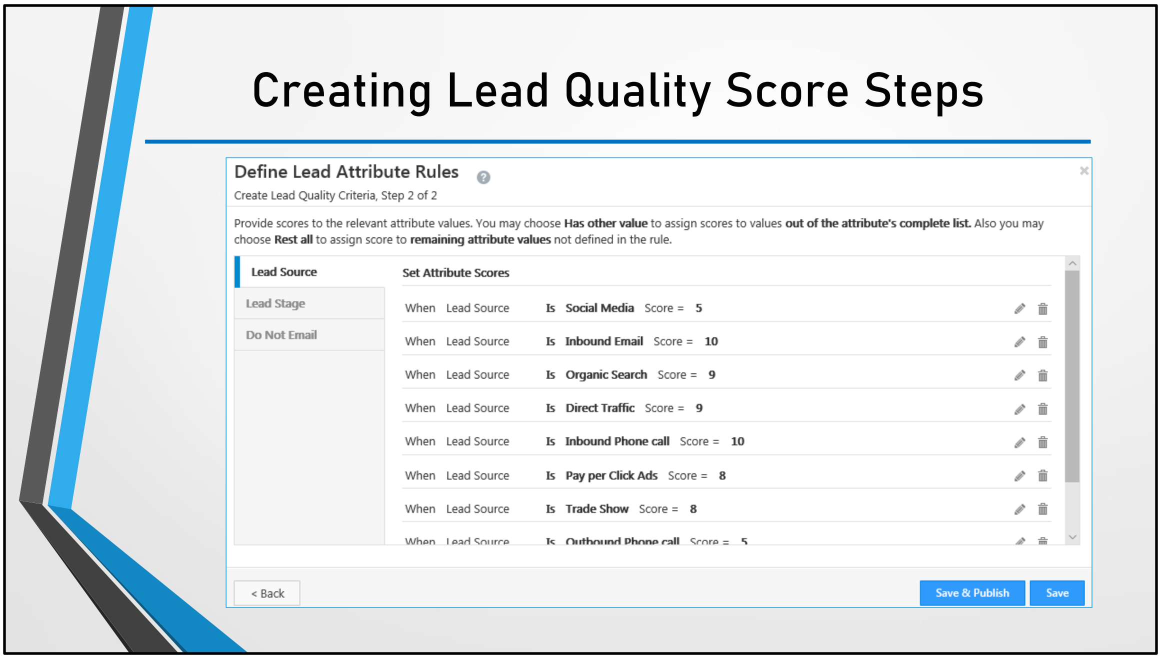
Lead Quality Criteria helps you to set rules to identify high quality leads. Leads are evaluated against these rules and assigned a score. This score can be used to filter leads that are best suited for carrying out sales activities.

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





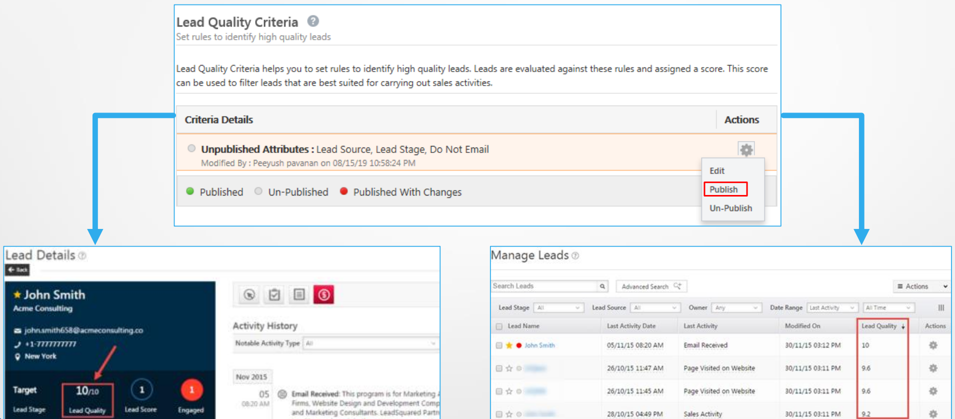
Choose the attributes of lead which can potentially define the quality of lead. You may choose to provide **different weightage for each attribute** and indicate if **it is mandatory for an attribute to have a value** to calculate a quality score of a lead. If different weightage should be provided to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



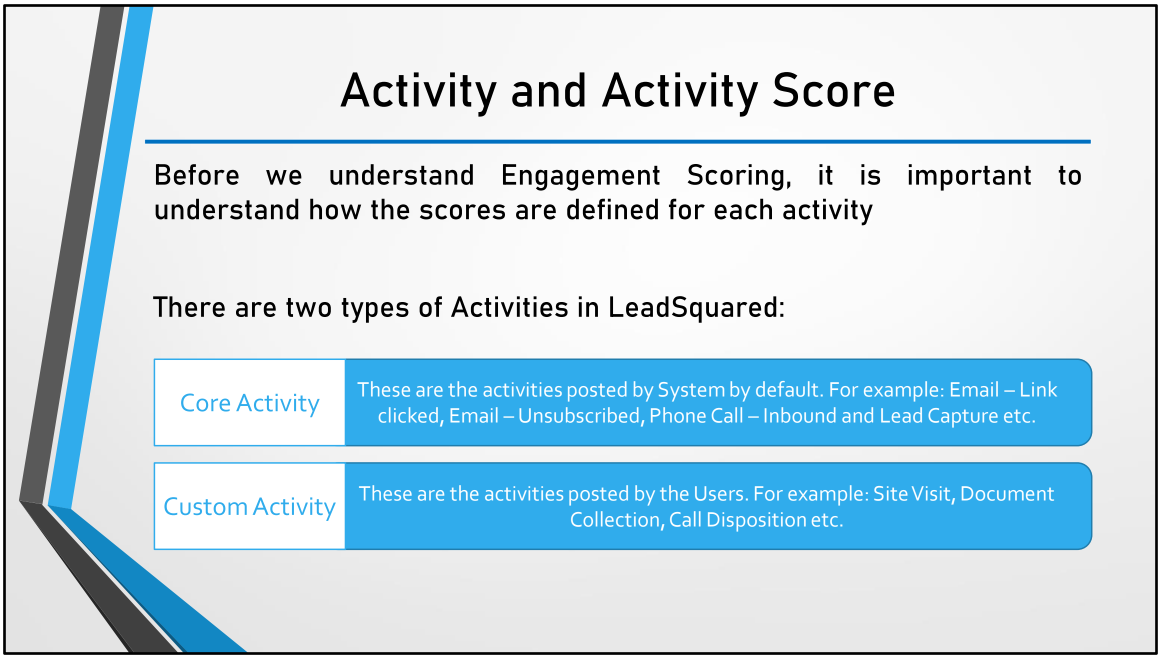
Provide scores to the relevant attribute values. You may choose **Has other value** to assign scores to values **out of the attribute's complete list.** Also you may choose **Rest all** to assign score to **remaining attribute values** not defined in the rule.

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.



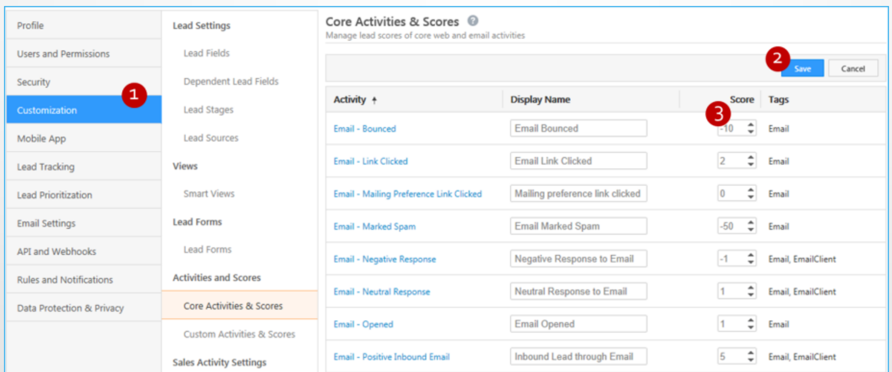
LeadSquared comes pre-built with several core or system activities like email bounced, email link clicked, website page visited, lead captured, etc. We automatically post these activities against your leads whenever they are performed. The activities then appear in the Manage Activities page or on the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

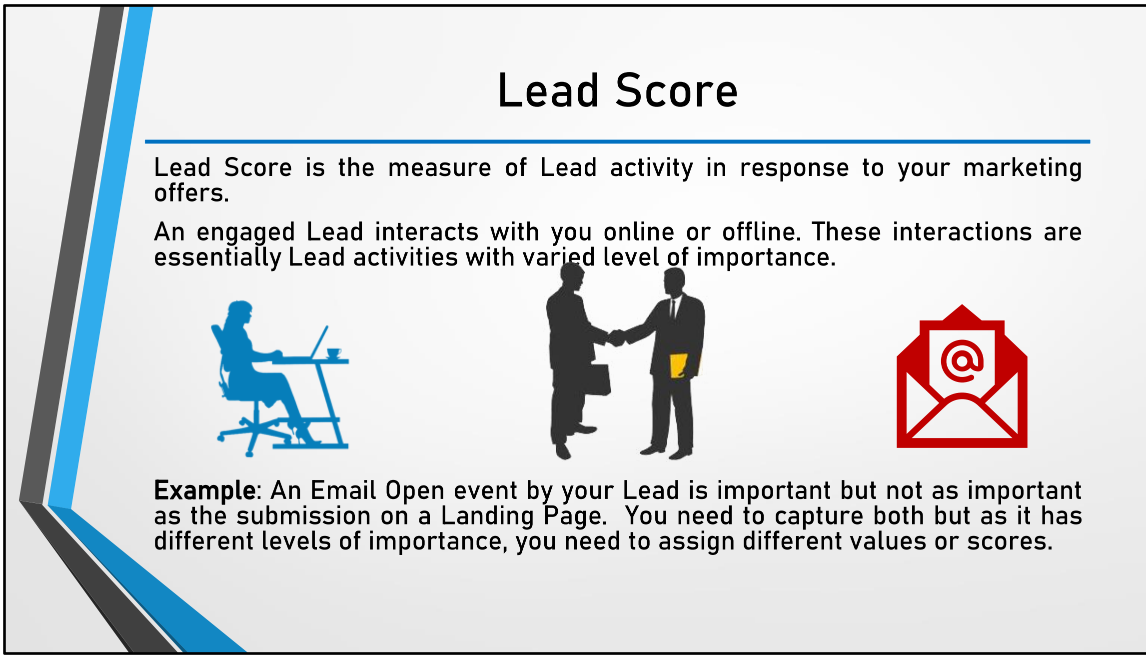
Defining Activity Score

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

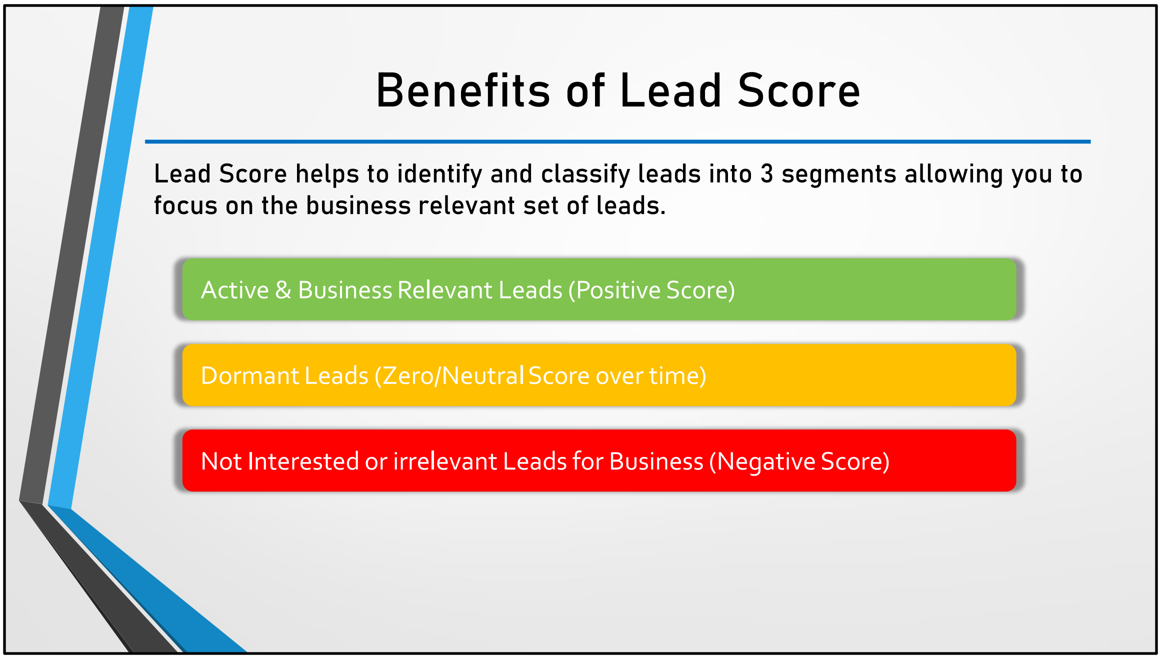


Lead Score is a numeric value associated with a Lead which allows you to measure its relative importance over other leads in the system. It allows you to segment hot Leads from the remaining leads. Lead Score is based on Notable Activities updated against the leads. A Notable Activity is any event that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



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.



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

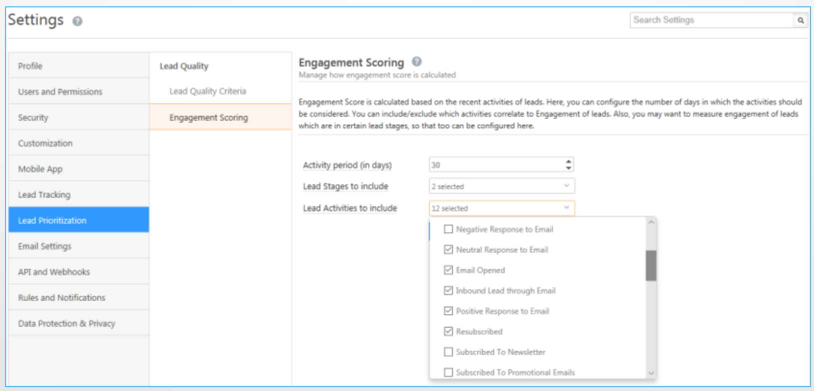
Consider you have a new business opportunity and you do an Email Campaign for it. One of the recipients (or Lead) opens the Email, clicks a links on it, comes to your Landing Page and submits. The aggregate Lead Score here is 2+5+5+10=22.

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.

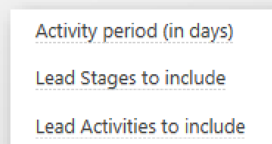
Lead Score vs Engagement Score

Lead Score

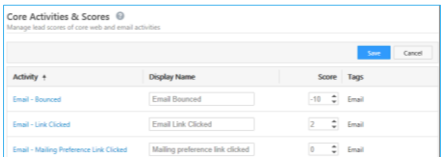
- Scored based on all the activity scores defined in the system
- Applicable to all the leads irrespective of which Lead Stage they are in
- Applicable for the entire timeframe the lead is present in the LeadSquared system
- Only Activity scores must be defined to calculate the Lead Score. No other configuration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

Engagement Score

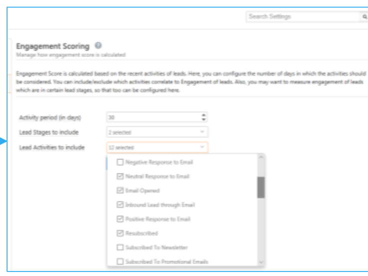
- Calculated based on the chosen lead activity's score
- Applicable only to the leads who are mapped to chosen lead stage/s
- Engagement scoring of the leads are calculated based on the activity period defined
- Conditions to calculate engagement score must be configured apart from defining Activity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

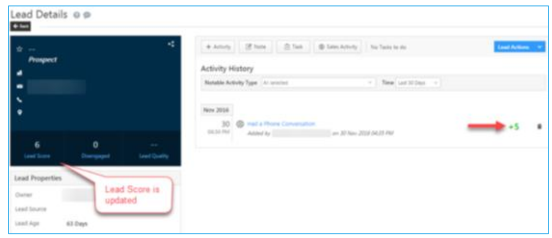


How Lead Engagement Scoring Works?



Define Activity Score





System calculates Engagement Score

Define the timeframe, Lead Stages and Activities to be considered

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

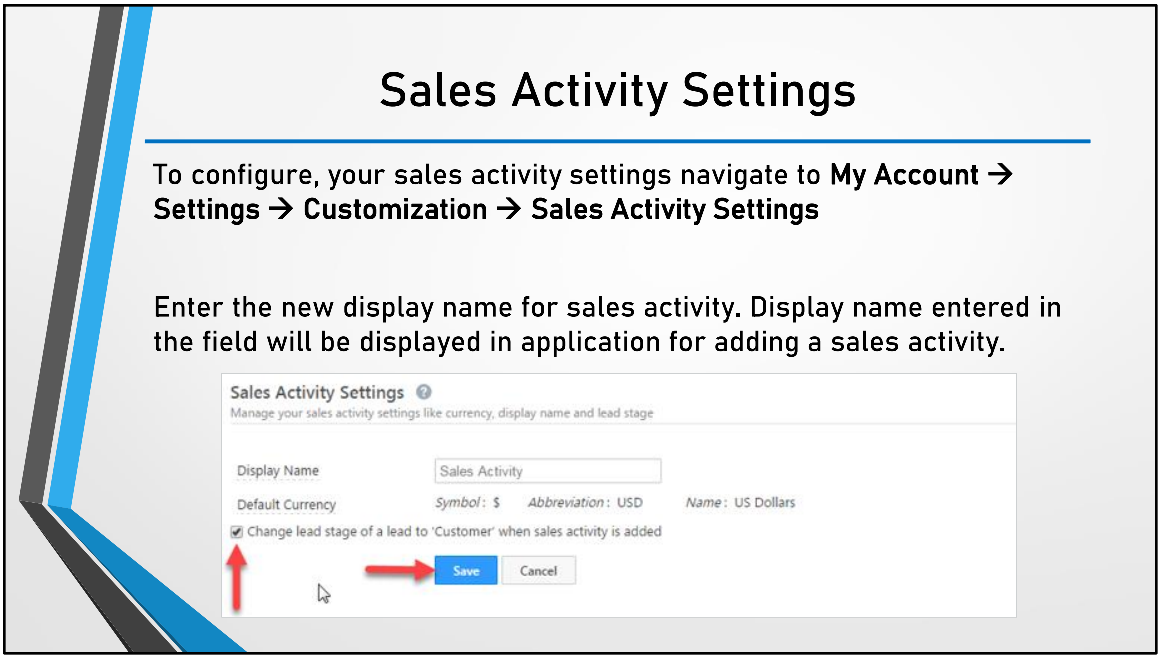
Sales Activity

Sales Activity

Sales Activity are the types of activity which captures revenue-based information.

With Core and Custom activities one can identify if a lead was converted into a customer or not but it cannot capture the monetary value of the lead hence, Sales Activity.

You can add different products and services provided by your company at one place and track the overall revenue generated.



The default value remains sales activity, but you can change it as per your needs like Enrollment, Registration, etc…

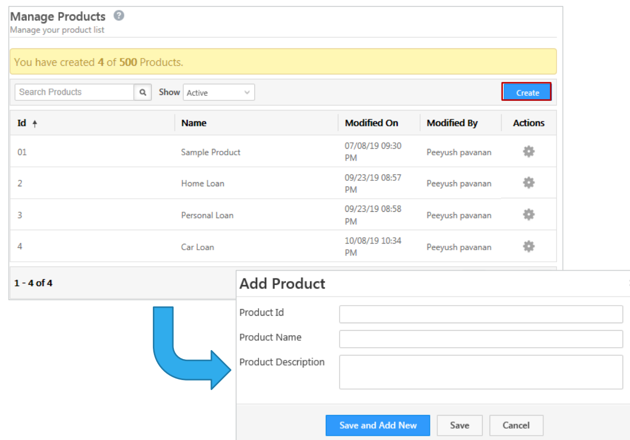
Deselect the checkbox in Sales Activity Settings as highlighted in screenshot above, if you don't want to change the existing stage of a lead to customer.

Note: Default currency can be changed from <u>Settings → Account Settings → Company Profile</u>.

Sales Activity - Product

Once general settings are configured, you are ready to add your products in LeadSquared.

1. Navigate to My Account → Settings → Customization → Manage Products
2. Click on **Create** button
3. Give Product Id, Product Name, and Product Description and click ***Save.***

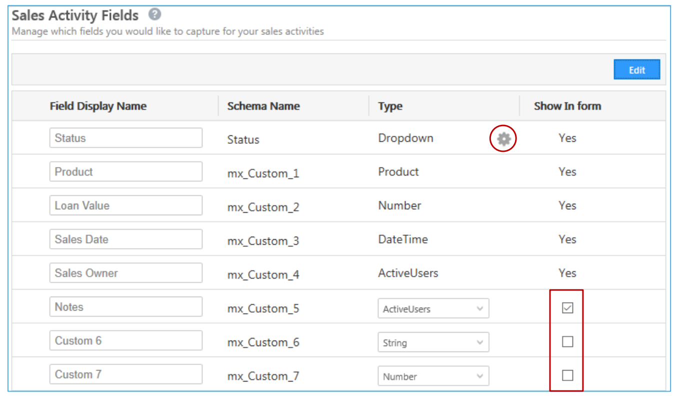


Sales Activity - Fields

After adding products you can configure your sales activity form using Activity Fields.

In case the field type is Dropdown like Status field, click on gear icon to define the options for Dropdown.

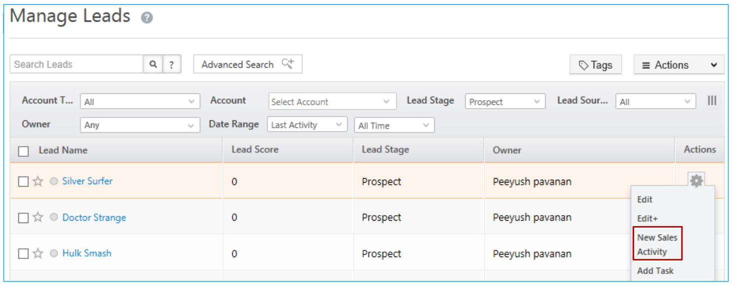
Whether a field should be displayed in the Sales Activity form depends if the Show in form checkbox is set or not.

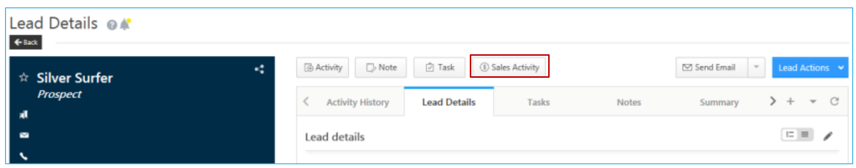


There are 4 system fields which are to be displayed as default fields in sales activity form and there are eleven custom fields which can be used as per business requirements to configure your form,

Adding Sales Activity

Sales Activity can be added from two places that are lead grid and lead details

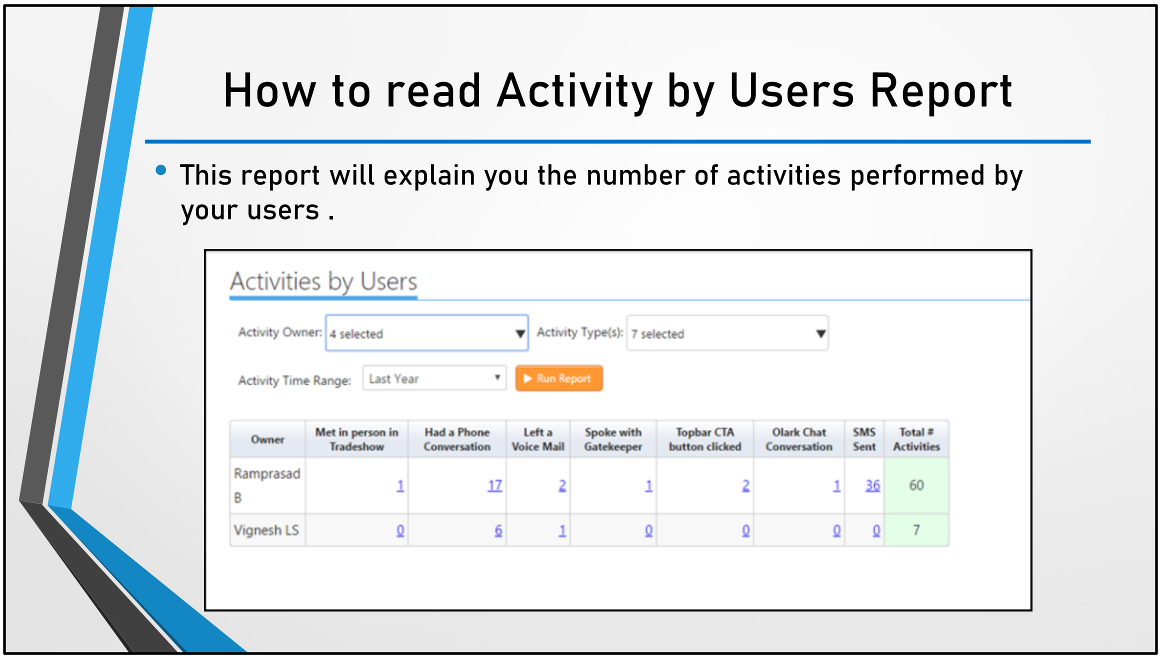




To add a sales activity from Lead Grid navigate to Lead → Manage Leads. Click on gear icon in the lead row and click on New Sales Activity

To add a sales activity from Lead Details page, open the lead detail and click on Sales Activity button

Activity by Users Report



LeadSquared provides powerful analytics as a part of its product. Now we have added one more report to make you understand how Activities posted by users are being counted.

Activity Owner – The users in your account who have performed an activity on the leads.
Activity Types – You can select the number of activity types that will be displayed as row headers to split the data based on the activity type as shown in the above image.
Activity Time Range – Used to filter the leads based on their activity posted date. In the above image, I have selected last year, so the report will show the number of leads on which the activity was performed.

Tasks

Task Types

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

Appointments	To Dos
Have a definite start and end date and time (14 November 2018 2.p.m to 4 p.m.).	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 appointments include meetings, webinars, demos, presentations, etc.	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.
Show up on both the classic list and calendar views on the Manage Tasks and Smart Views pages.	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 –

Lead List

Lead List

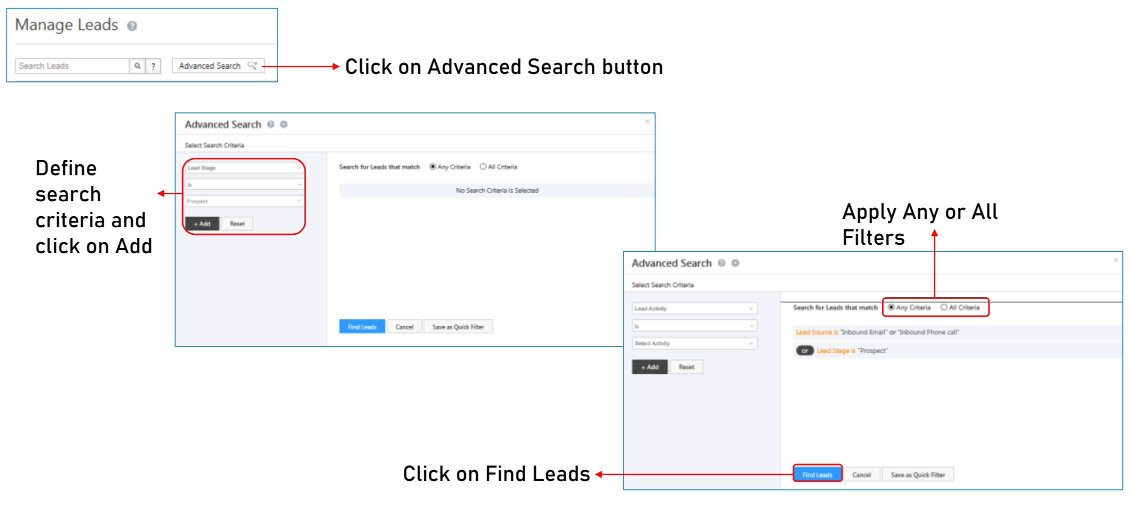
Lead lists are a group or collection of Leads. The leads in a list match certain criteria or you can choose to put them together manually.

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

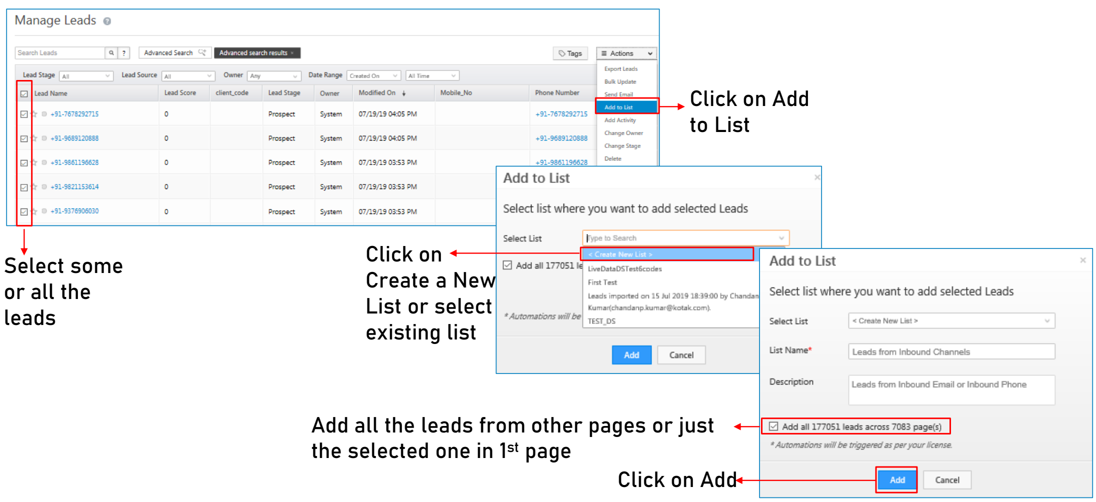
Create Lead List



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.



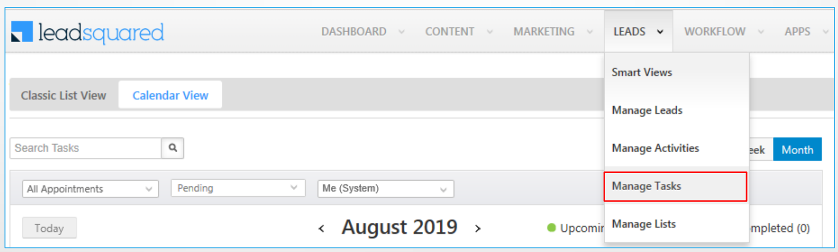
LeadSquared system will take you back to the Manage Leads page displaying the list of leads that satisfies the defined search conditions in the Advance Search.

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.

Activity List and Task List

Like Lead List, you can create activity and task list.

To access all the lists, navigate to: Leads → Manage Lists



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

Smart Views

Smart Views

The Smart Views page allows access to accounts, leads, activities, and tasks in one place.

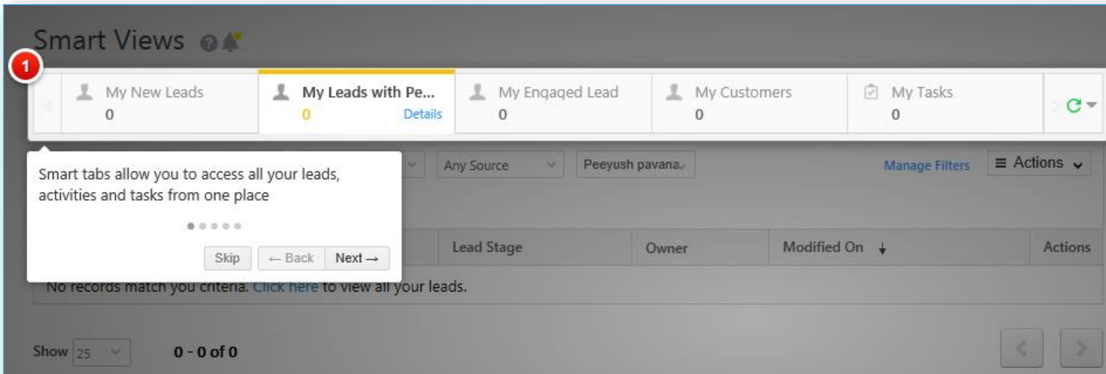
It's like the Advanced Search feature on the Manage Leads page, but has the following advantages –

- Gives sales users a single work area for accessing accounts, leads, activities and tasks.
- Provides a better alternative to quick filters – one can view their saved filters as tabs and apply filters and sort orders per tab.
- Shows the count of leads on each tab.
- Automatically refreshes so the tabs are always updated.

You can also receive daily reports for the views you create. So if you want a daily report for new leads added, pending tasks for the day, sales tasks completed yesterday, activities posted yesterday, etc., all you need to do is set up a view and subscribe to the report (For more details, see the 'Subscribe to Smart Views Reports' section of this article).

Default Tabs from LeadSquared in Smart Views are:
1. My New Leads
2. My Leads with Pending Tasks
3. My Engaged Leads
4. My Customers

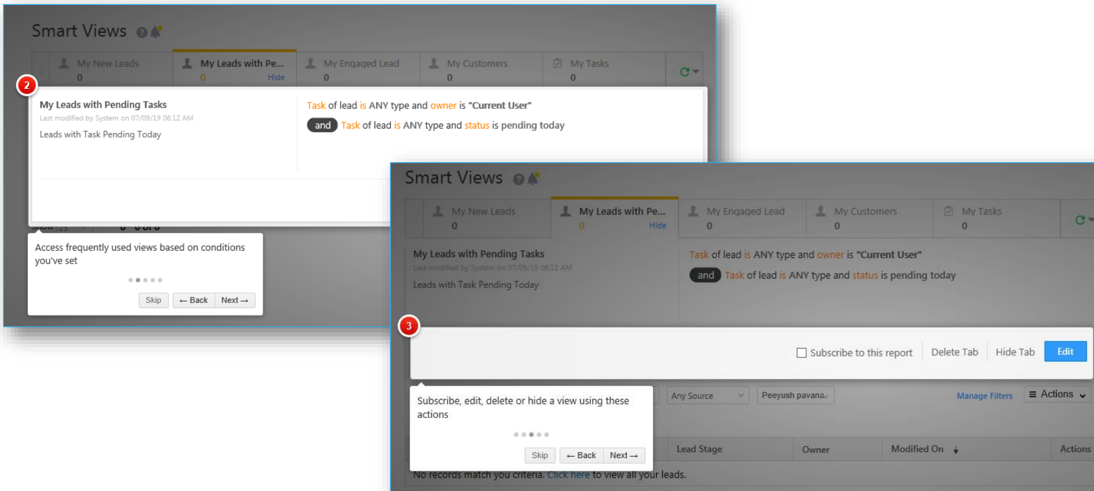
Smart Views features



Smart Views brings Lead List, Activity List and Task list along with Advanced search feature in one page. It is one of the powerful feature of LeadSquared which allows the users to manage their daily task in one screen based on their requirement. Above all, it allows the users to subscribe to reports based on Smart View individual tabs thus allows users to analyze the data as needed.

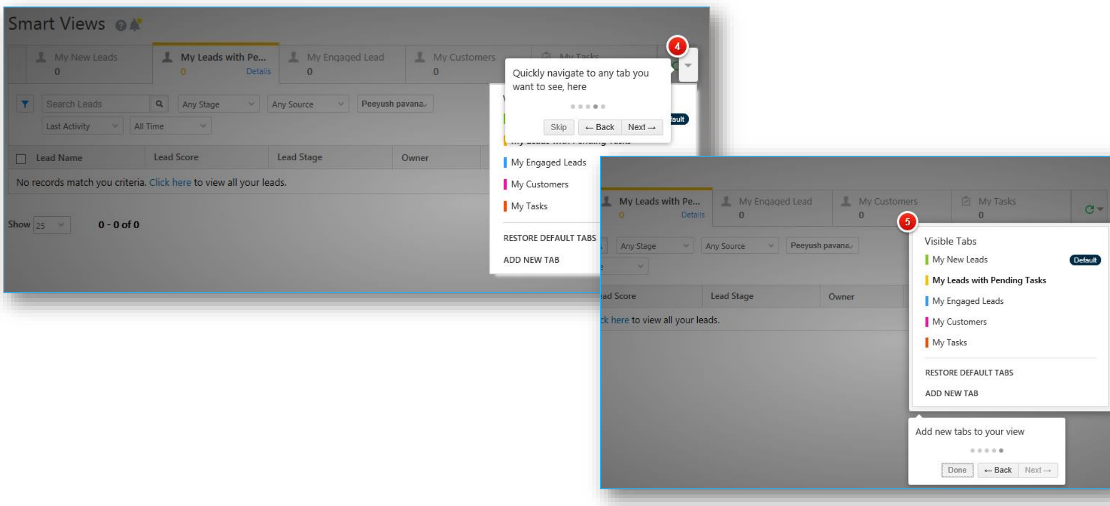
Users can search for leads and apply filters within each tab, edit the search conditions and hide or delete the tabs they don't want to see.

Smart Views – Access Conditions and Subscribe to Reports



Users can subscribe to the Smart Views Daily Report that summarizes the latest accounts, leads, activities and tasks added to their smart views filters.

Smart Views – Quick Navigation and Manage Tabs



Smart Views allows user to create a new tab alongside the default tabs.

Automation

Automation - Triggers

Triggers define when the automation should be executed or initiated. In LeadSquared there are 4 trigger points which could initiate an automation. These are:

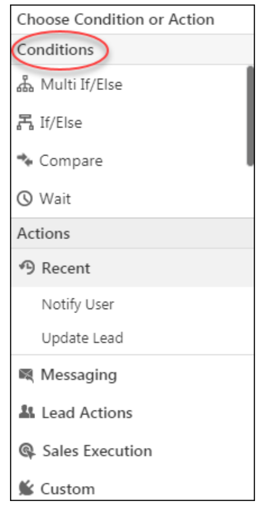
1. Lead Triggers
2. Activity Triggers
3. User Triggers
4. Task Triggers

Automation - Conditions

When a condition is met, the next step in your automation will trigger.

You can follow up a condition with an action (e.g., wait 3 days then send an email) or with more conditions (e.g., wait 3 days then check if the lead stage has changed).

The conditions you can set are 'Multi If/Else', 'If/Else', 'Compare', 'Wait', 'Wait Until Activity' and 'Split Test'.



If/Else
The If/Else condition lets you setup Yes/No criteria. It allows you to set up alternative courses of action based on whether your criteria is met or not. You can set up If/Else conditions on lead, activity and task fields.

Multi If/Else
Helps you set multiple If/Else conditions at the same level. Use the Multi If/Else condition when you have many outcomes to automate. The If/Else cards here will be aligned at the same horizontal level and the performance will be faster than using many single If/Else cards.

Compare
The 'Compare' automation action lets you compare the values of lead and activity fields and set up different courses of action based on the results. You can also use saved responses from webhooks and Lapps in your comparisons.

Wait
The wait condition lets you delay an action or condition for a specified period. A few of the many applications of this feature are listed here –

- Delay sending emails to avoid flooding a lead's inbox.
- Wait till a lead score exceeds 'x' number and then change the lead stage.
- Wait a certain amount of time to see if a lead has performed an activity (Email opened, email link clicked, etc.) and then send a follow-up email.
- Wait till a lead's stage changes from 'Opportunity' to 'Customer' and then send 'Customer-only' discount emails.
- Send email campaigns on specific occasions (birthdays, festivals, etc.).
- Wait till a sales user has sold a product and then send a thank you email.

If you are giving an Email action, you have the option to give another condition called **Wait Until**. This condition allows you to delay until an Email activity is satisfied by the Lead in order to proceed to another action.

Wait Until Activity
The 'Wait Until Activity' condition lets you wait until activities are performed before taking an action. You can choose to wait until a single activity occurs or you can set **and/or** conditions to include multiple activities.

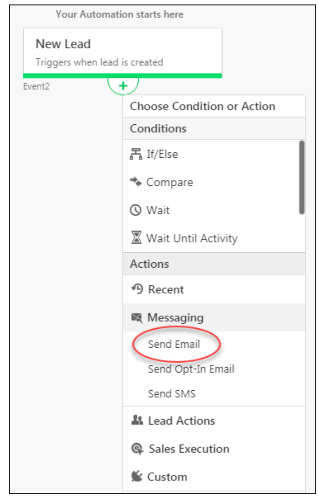
Note: The 'Wait Until Activity' automation card **must** be followed by an action.

Split Test
Lets you experiment with different email content to see what your customer engage with best.

Automation Actions – Messaging

The Messaging action of Lead Automation allows to system to send an email/SMS to the leads once when the conditions are met.

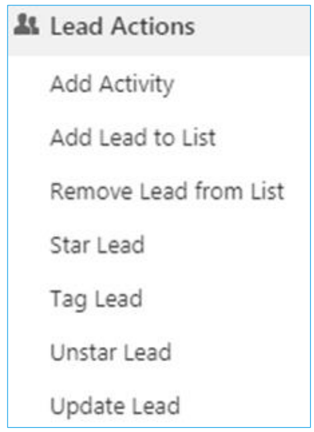
Sending SMS through automation requires you to **first install and configure an SMS connector**.



Automation Actions – Lead Actions

Following are the leads actions that system can perform as and when the conditions are met:

1. Add Activity
2. Add Lead to List
3. Remove Lead from List
4. Star Lead
5. Tag Lead
6. Unstar Lead
7. Update Lead
8. Update Activity



1. **Add Activity**: Allows you to add a custom activity. Click *Add Activity* and the Add Activity pop-up box appears. **Note**: If your custom activity has any associated custom field, click *Add an Additional Field* to add and select custom activity fields to associate to the activity. You can additionally add mail merge field to the selected activity type.

2. **Add Lead to List**: Allows you to add the Lead based on the previous scenario satisfied by the Lead in the workflow. Click *Add Lead to List* and the following pop-up box appear.

3. **Remove Lead from List**: Allows you to remove a Lead from a list based on the previous scenario in the Automation workflow. Click *Remove Lead from List* and the following pop-up box appears.

4. **Star Lead**: Star Lead allows you to highlight and discover Leads easily.

5. **Tag Lead**: Allows you tag a Lead. Tagging is a quick way to add a label to a lead for easy identification of Leads.

6. **Unstar Lead:** Allows you to unstar or unmark a Lead as important.

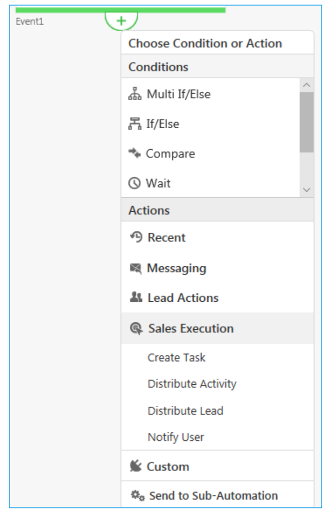
7. **Update Lead:** Allows you to update the Lead field values with new values if required. Here as an example, the Lead Stage is given as Opportunity and Notes is also updated. These Lead fields are updated with these values if the Lead satisfies the criteria you have specified.

8. **Update Activity:** If you have selected an activity based trigger (New activity on lead or Activity update on lead), you an additional lead action, *Update Activity*, will appear under the lead actions menu. This functionality lets you automatically update any field created under that activity.
   - Let's say you triggered your automation with a 'New Activity on Lead' and set that new activity as a 'Meeting'. You can now use the *Update Activity* option to automatically update any fields created under the meeting activity.
   - Say you want to update the 'Notes' field of the meeting to say 'Done with Meeting', just click the *Update Activity* option, select the 'Notes' field and add the value 'Done with Meeting'. You can also add additional activity fields using the *Add Activity Fields* link

Automation Action – Sales Execution

The Actions under Sales Execution of Automation handles the following output:

Create Task
Distribute Activity
Distribute Lead
Notify User



Notify User: Allows you to send a notification Email to a LeadSquared user. By default, the notification is directed to the lead owner. You can add more LeadSquared users to the '*To*' field. You can also direct the notification to the activity owner or include the activity owner in the '*Cc*' or '*Bcc*' fields. You can also mail merge lead fields, owner fields, sender fields and activity fields into your email content using the mail merge option

Create Tasks: Allows you to create both appointment and to-do type tasks. **Note:** You can mail merge lead and activity fields in the subject and description of the task. You can also schedule the task to be created using date-time fields from an activity (only for automations with activity triggers).

Distribute Leads: The distribute lead action allows you to set conditions to distribute leads among your users. As an example, let's say you want to distribute all leads from a certain city to specific users. Click the **Distribute Lead** action to open the **Distribute Lead** pop-up window. Enter a rule name in the space provided and then click the **choose conditions(s)** link.

On the **Select Criteria** pop up, choose the lead field as **City** and then enter **Bangalore**.

Next, click **Add Condition.** Now select one of the following options from the drop-down

- **Users** – Select users to distribute the leads to.
- **Sales Groups** – Select the group you want to distribute leads to.
- **User Properties** – Perform an advanced search based on user attributes.

While distributing leads to users, You'll see an **Availability Status** section at the bottom if you've enabled the Check In and Check Out feature for user management. You can toggle the between the **All** and **Available** options to distribute leads to all users or to available users only.

You can proceed to add multiple rules by using the **New Rule** link. You can name each rule and then re-order them by simply dragging and dropping. The rules will execute in the sequence you set up.

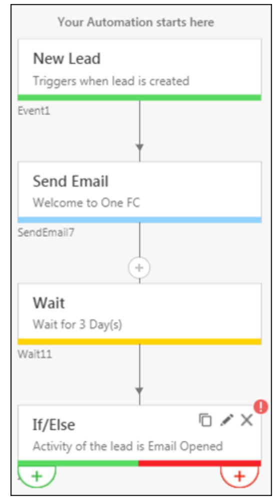
You must set a default rule that will execute when no other rules match the set criteria. The default rule will automatically distribute the lead to a user you select.

Note: If you've chosen the **Available** users option and the user is not available, the lead will be distributed to the user specified in your default rule.

Automation Action – Send to Sub-Automation

Use it to –

1. Keep your main automation brief and simple by sending additional steps to a sub-automation.
2. Re-use a standard sequence of steps across different automations.
3. Build a large network of automations without running out of automation cards/nodes (Only 50 nodes are allowed in a single automation).



Example:
You're sending out an email to all new leads. You want to follow one long course of action (Flow A) for leads that open your email and another (Flow B) for those that don't.
Before you branch out into Flow A or B, your automation may look something like the screenshot given above.
The green + icon under the If/Else automation card will branch out into Flow A, your positive flow for the leads who opened your email.
The red + icon will branch out into Flow B, the negative flow for leads who didn't open the email.
The sub-automation feature now lets you send both flows (A and B) to separate sub-automations and keep your parent automation clean. What's more, you can re-use Flow A and B across any new automations you create.

Points to Remember

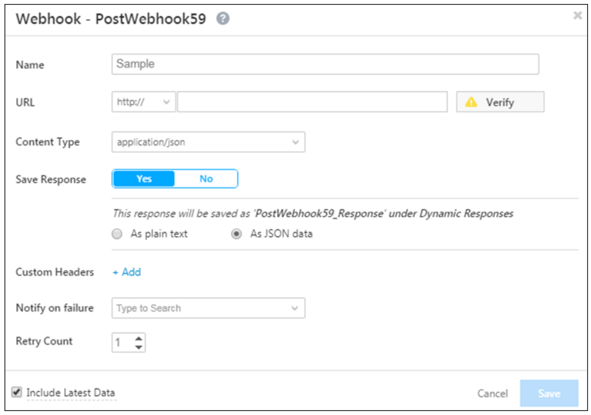
- Only published sub-automations will show up in the Send to Sub-Automation pop-up. You can send your main automation to any sub-automation you published previously.
- You can create sub-automations to a maximum of three levels (Main

Automation>Sub 1>Sub 2>Sub 3).

- You can create up to 500 sub-automations.

Automation Action – Custom (Webhook)

Use webhooks to automatically post activities to a URL of your choosing.

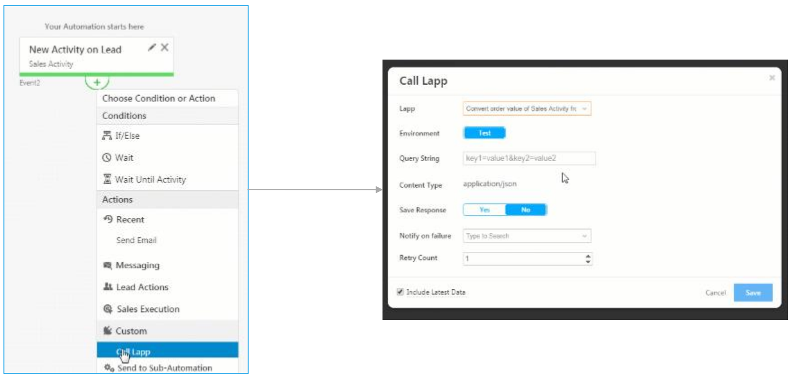


Note: The latest data generated using the webhook is the data retrieved just before the execution of the action you specify in the automation.

Name: Enter any name for the webhook.
URL: Enter the URL you want to post the data to.
Content Type: Choose the format you want the data to be posted in.
Save Response: Allows you to save the response from a webhook and use it to send dynamic email content or in other automation actions.
Custom Headers: For security purposes, you can choose to enter a custom name-value pair in the webhook header and then reject all webhook calls where this header isn't present.
Notify on Failure: Get notified every time a webhook fails.
Retry Count: The number of times you want to retry on failure.

Automation Action – Custom (LApps)

After publishing a Lapp to any environment (test or live), you can call it using LeadSquared Automation.



After publishing a Lapp to any environment (test or live), you can call it using LeadSquared Automation.

Automation for Marketing

Drip Marketing via Automation

Drip Marketing

Drip Marketing is any marketing communication broken down into bits and spread across an extended period to gently nudge the prospect to take an action, instead of selling point-blank.

The mark of a good drip email campaign is the prospect not even realizing that it's a pre-written, automated email. It should delight your recipients and make them think that it was written only for them.

Objective of Drip Marketing is not to sell the product in the first few interactions but to nurture the leads and help him reach the final stage.

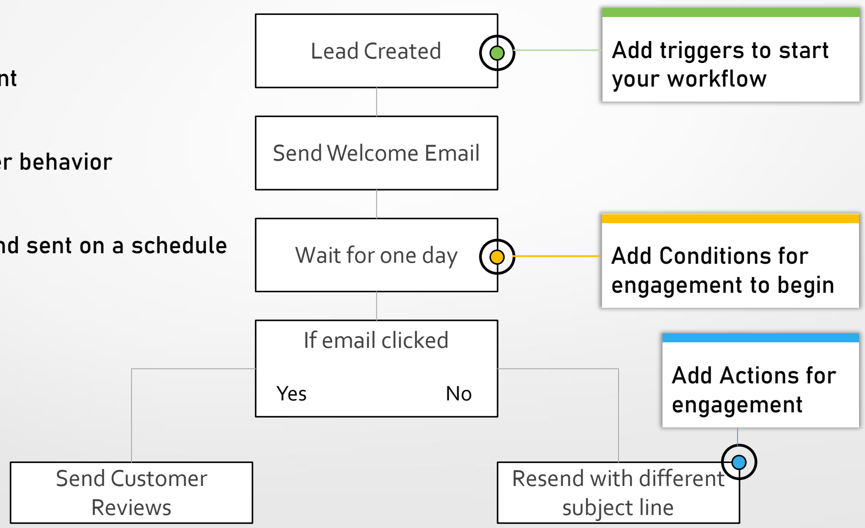
Features and key elements of Drip Marketing

Features

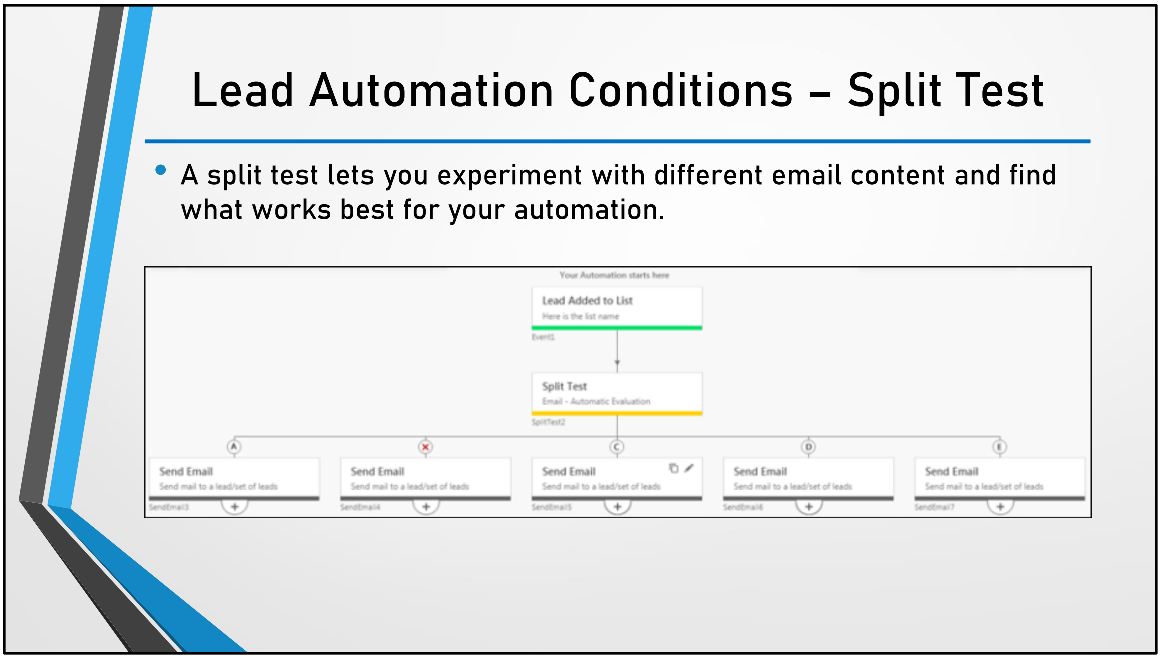
- It is super relevant
- It is personalized
- It is based on user behavior
- It is pre-written
- It is automated and sent on a schedule

Key Elements

- Triggers
- Conditions
- Actions



Split Testing/A-B Testing via Automation

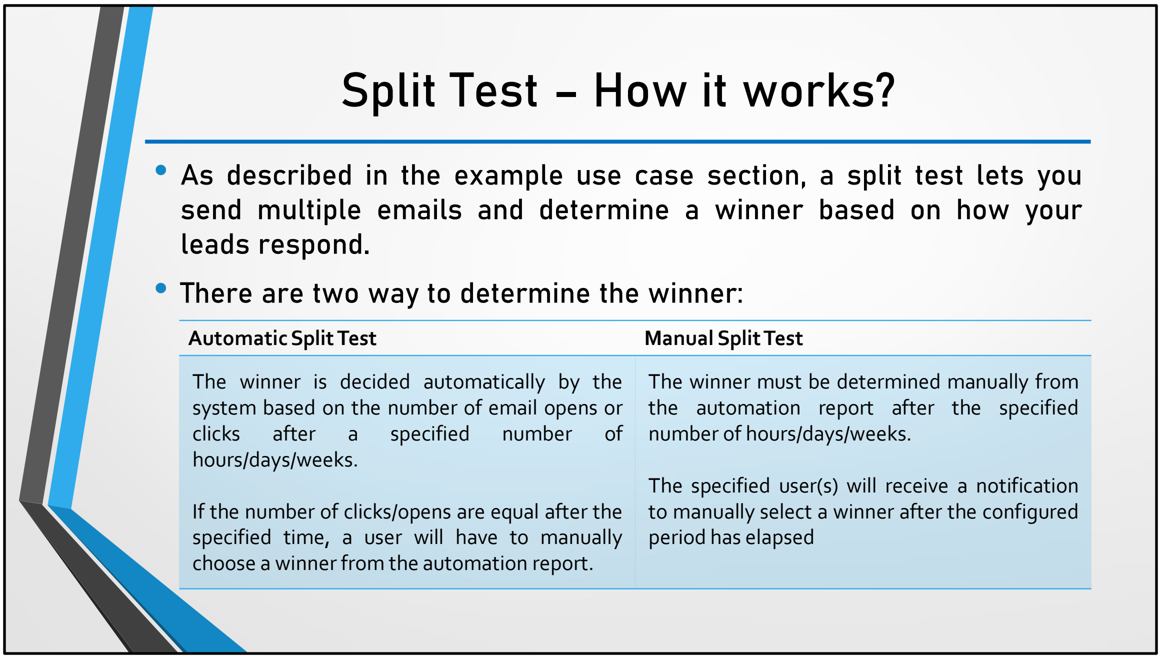


You can try out different subject lines, senders, etc. and see how your leads are responding. Based on the responses you can either manually or automatically select the best email to use going forward. Lead Automation Conditions – Split Test

Split Test – Use Case

- Let's say your marketing team produced two different subject line for same email but unsure which will get them more traction either in terms of highest email open or highest number of links clicked in the email. Will it be?
  - "Hey, we're so glad you signed up" or
  - "Welcome to the <my organization> family!".

With split test, you can send 2 emails (one with each subject line) to your leads and analyze which one receives more opens/clicks. Based on these results, you can select one of the emails as the 'winner'. All new leads entering the automation will now only receive the email you chose as the 'winner'.

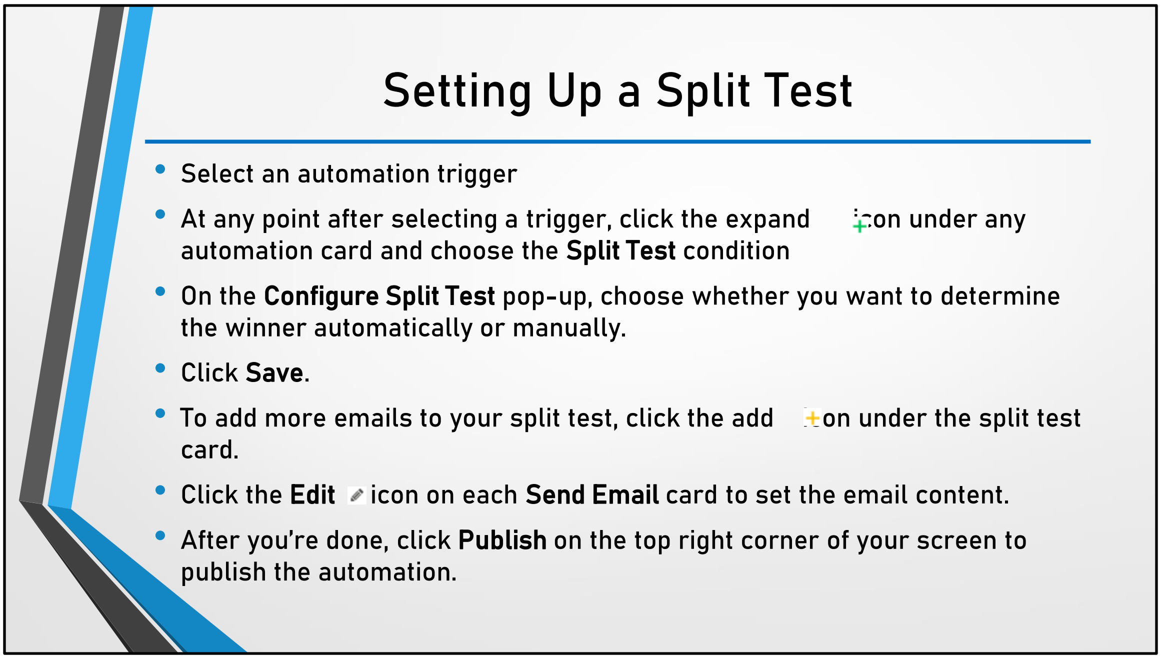


Prerequisites
The split test feature is only available on select plans. If you want it enabled for your account, contact us at support@leadsquared.com.

Note: These emails are sent to your leads in round robin fashion until a winner is determined.

Once an email is selected as the winner (automatically or manually), it'll be sent to all leads entering the automation from that point onward.

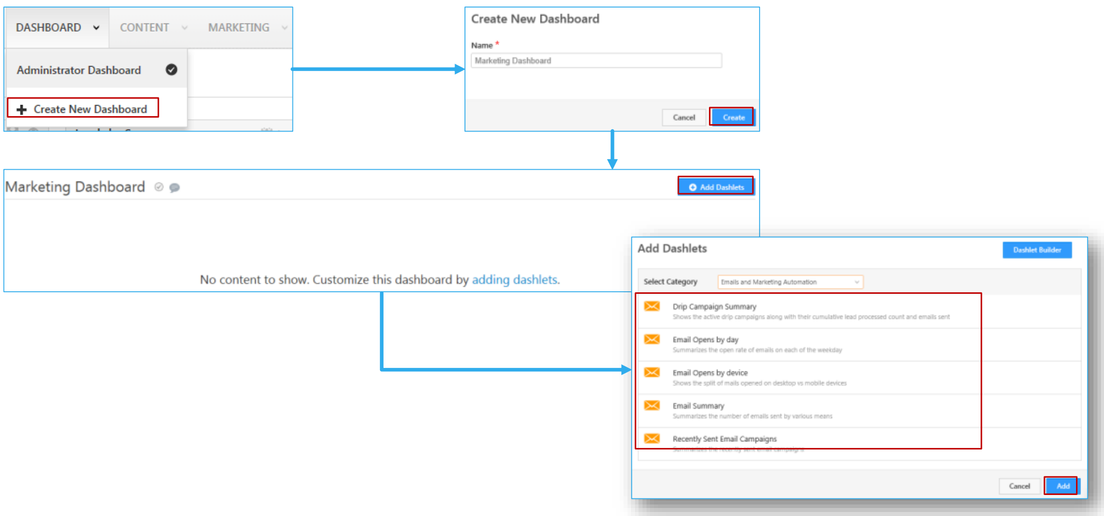
Note: You can test up to 5 different emails.



1. If you select the **automatically** option, choose whether you want to determine the winner based on the number of email opens or clicks. Next, set the number of hours/days/weeks you want the winner to be determined after. Finally, select the users you want to notify once a winner is determined.
2. If you select the **manually** option, choose the user(s) you want to notify to select a winner. Then set the number of hours/days/weeks you want to wait for before you allow users to select the winner.

Sales Reports and Dashboards

Creating Dashboard and Adding Dashlets



Sales Reports

Field Sales Tracking (3)
Reports to help track field sales team

Lead Insights (26)
These reports give you insight on your lead data across various attributes and time periods

Lead Stage Analysis (10)
Helps you analyze data by Lead Stages

Sales Group-Wise Analysis (18)
Analyze sales user performance and get lead insights by Sales Groups

Telephony and SMS (5)
These give you statistics and reports on your telephony and SMS usage and trends

Large Exportable Reports (9)
List of reports with large data sets that you can export and receive through email

Lead Source Analysis (9)
Helps you analyze lead submission and capture sources

Sales and Revenue (4)
Revenue performance analytics - find revenue generated by User, Source, Geography and other parameters

These are some of the pre-defined sales reports LeadSquared provide. For custom reports, contact us.

Thank You!

You have successfully completed the 4th module of the LeadSquared Foundation Course.