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Business Development Start Up Guide

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WHAT IS CRM LOGIC?

CRM Logic is a lead management system that can be utilized by any sales organization.

Allows Business Development (BD) teams to track and market to potential referral partners.

By using CRM Logic, BD's can prospect and determine who to prioritize in that process.

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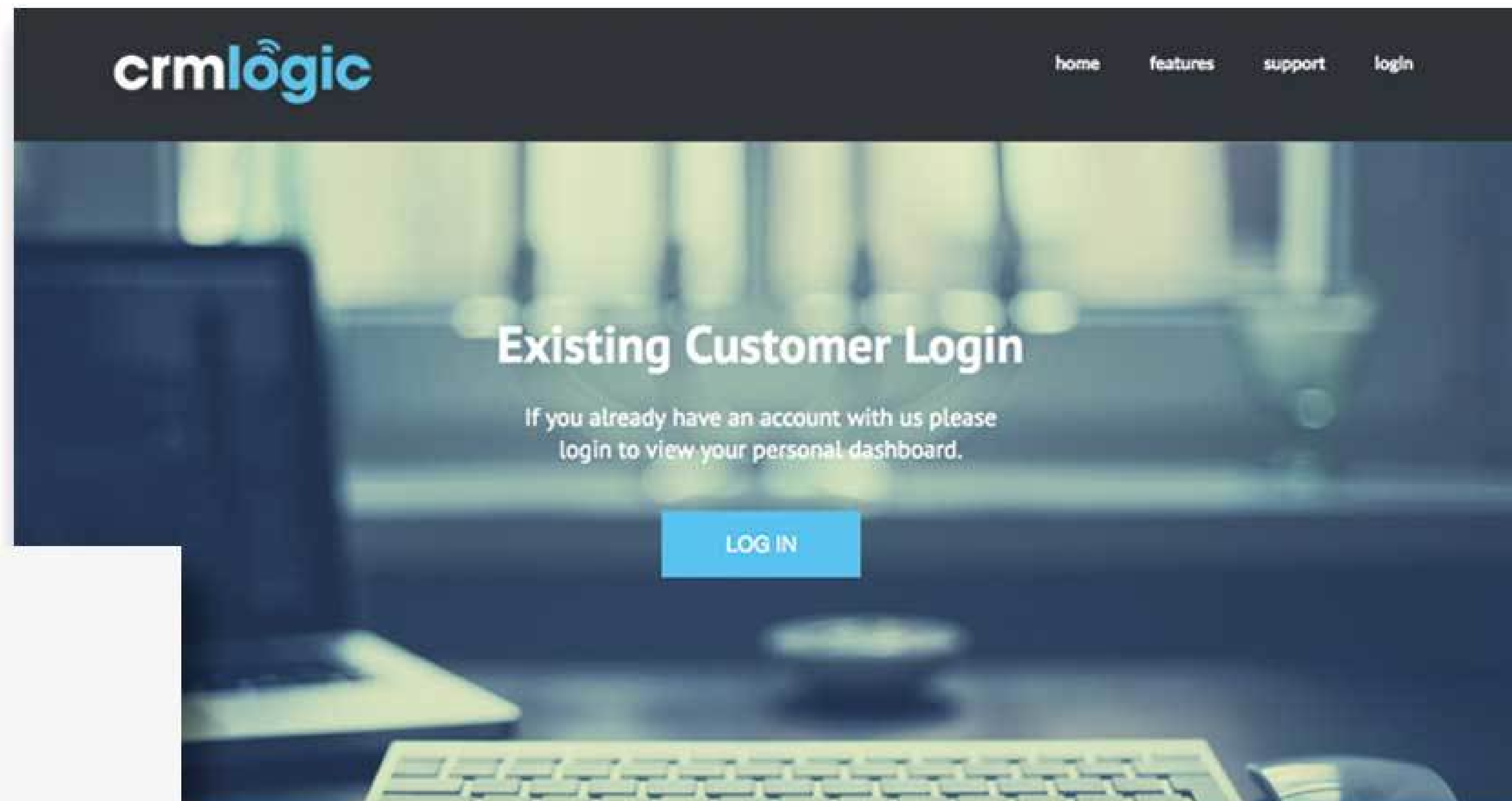
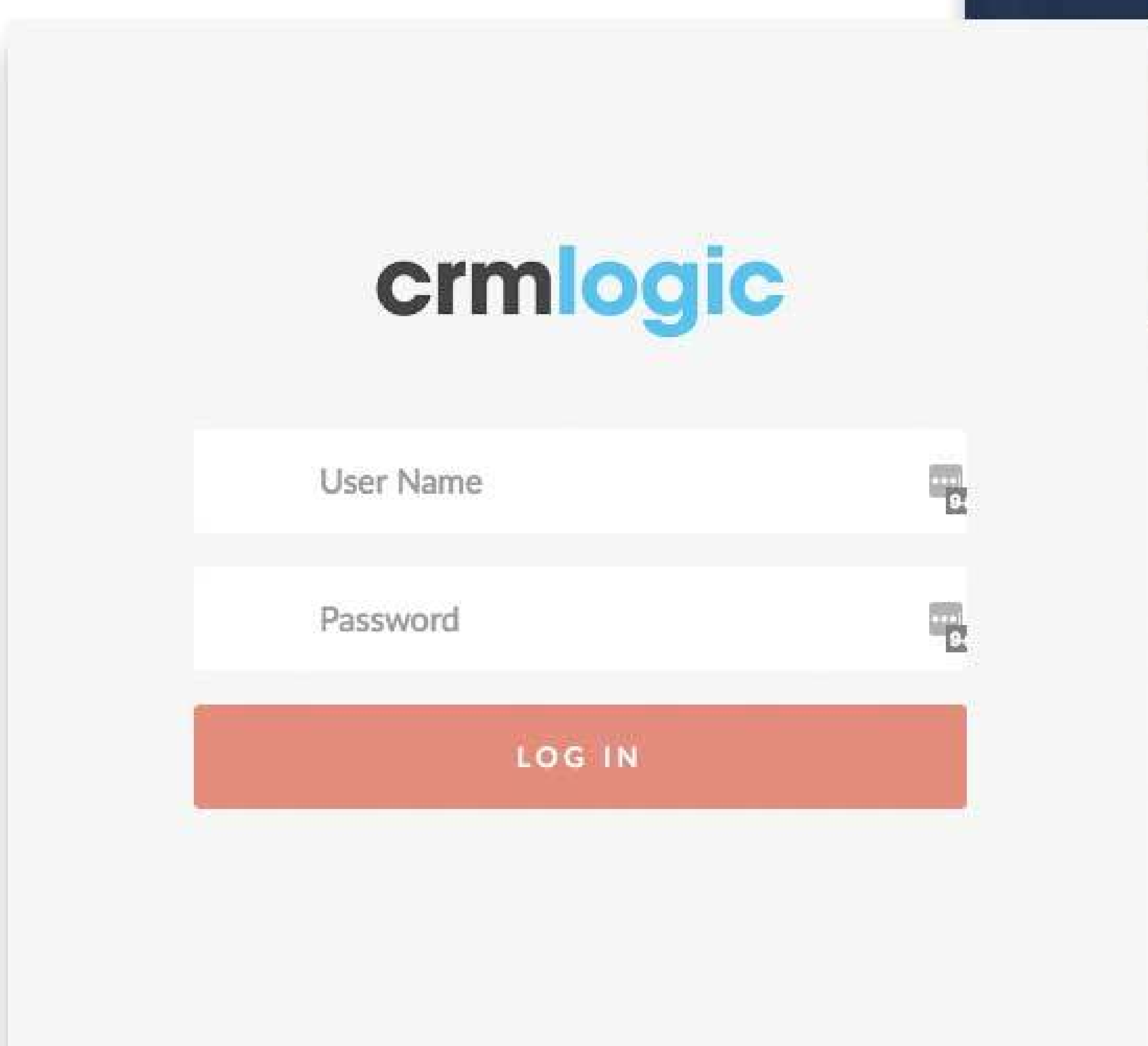
ACCESSING YOUR ACCOUNT

To access your account go to www.crmlogic.io





Use the credentials provided to log into your account.

If you do not have credentials please have your supervisor email us at info@crmlogic.io

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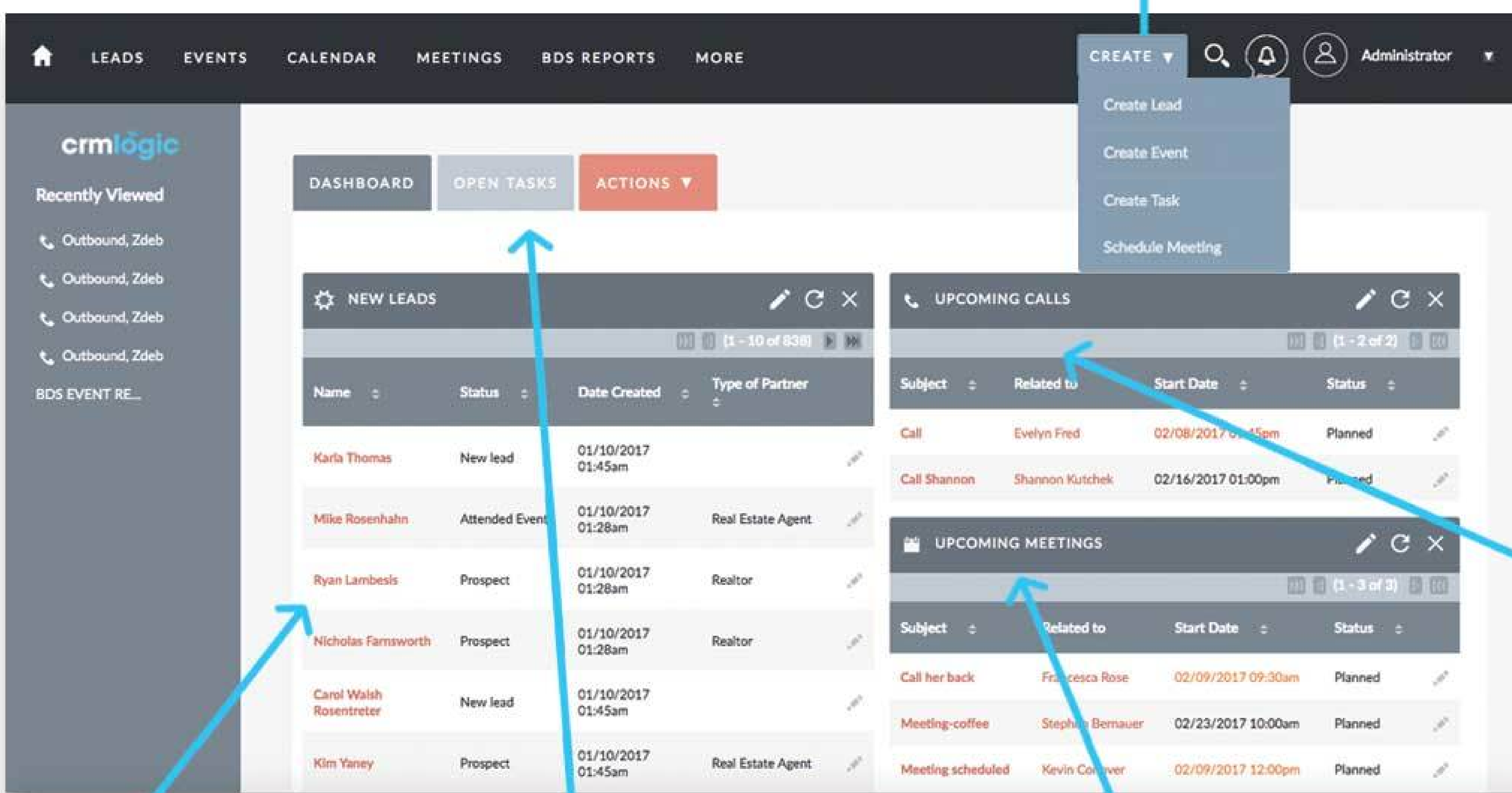
USING THE SYSTEM

The Dashboard

Return to the dashboard

Your dashboard gives you a quick overview of all of your activity. Quickly view recently added Leads and Notes or look to see if you have upcoming Calls, Meetings or Tasks



Quick Create

Quickly create ACTIONS: New Leads, Events, Tasks & Meetings.

Recently Viewed

Find items that you have recently visited.

Upcoming Calls

View Calls that have been scheduled to take place in the next 30 days.

New Leads

Find Leads that have been created or assigned to you in the past 30 days.

Open Tasks

View personal Tasks or Tasks assigned by an administrator.

Upcoming Meetings

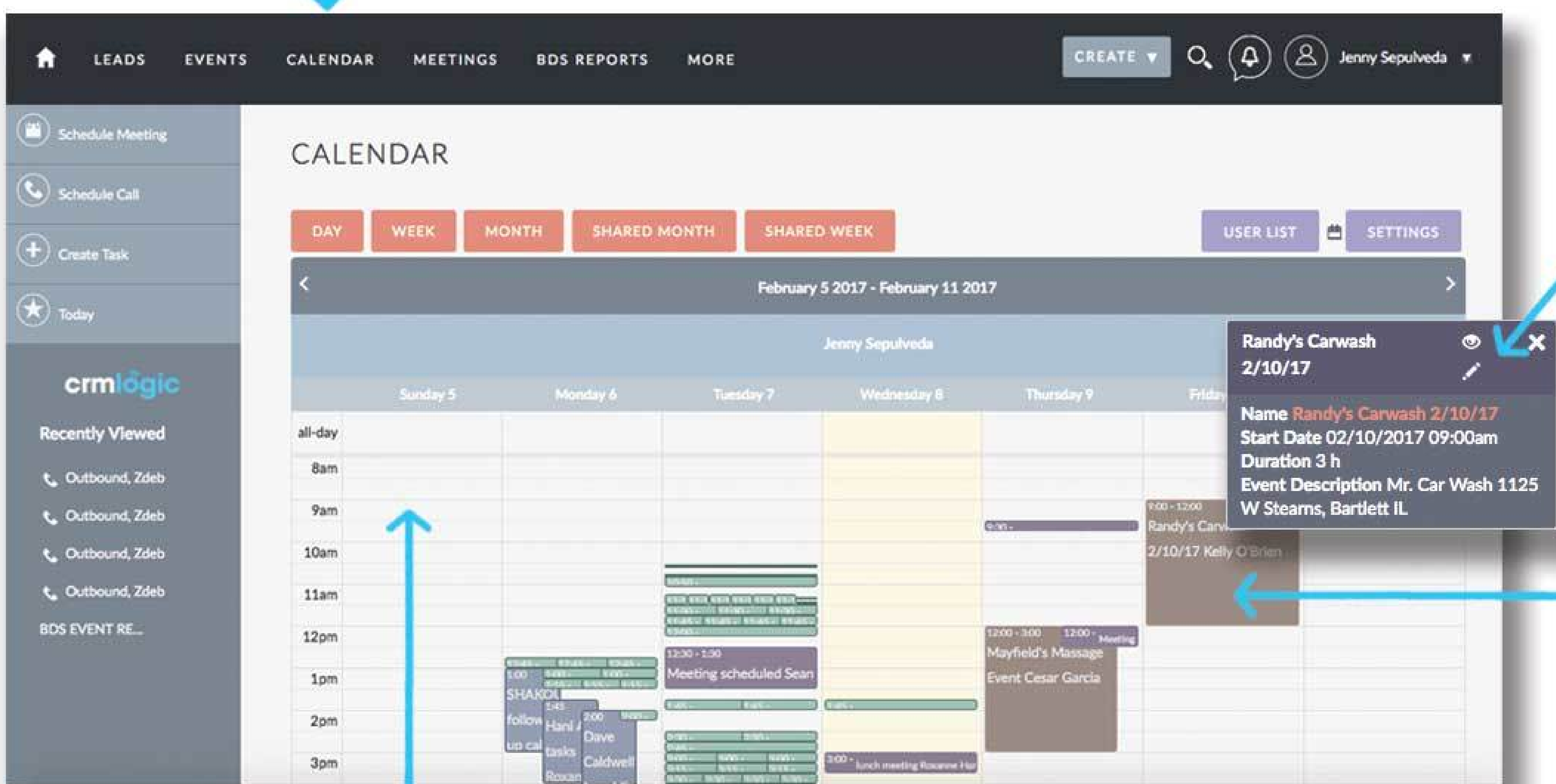
View Meetings that have been scheduled to take place in the next 30 days.

USING THE SYSTEM

The Calendar

Using the Calendar

Your Calendar allows you to see all of your scheduled Calls, Meetings and Tasks in one easy to use platform.



Edit Actions

Hover over a scheduled item and click on the pencil icon to edit the action.

Create New Actions

Click on an empty time slot to schedule a new Call or Meeting.

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USING THE SYSTEM

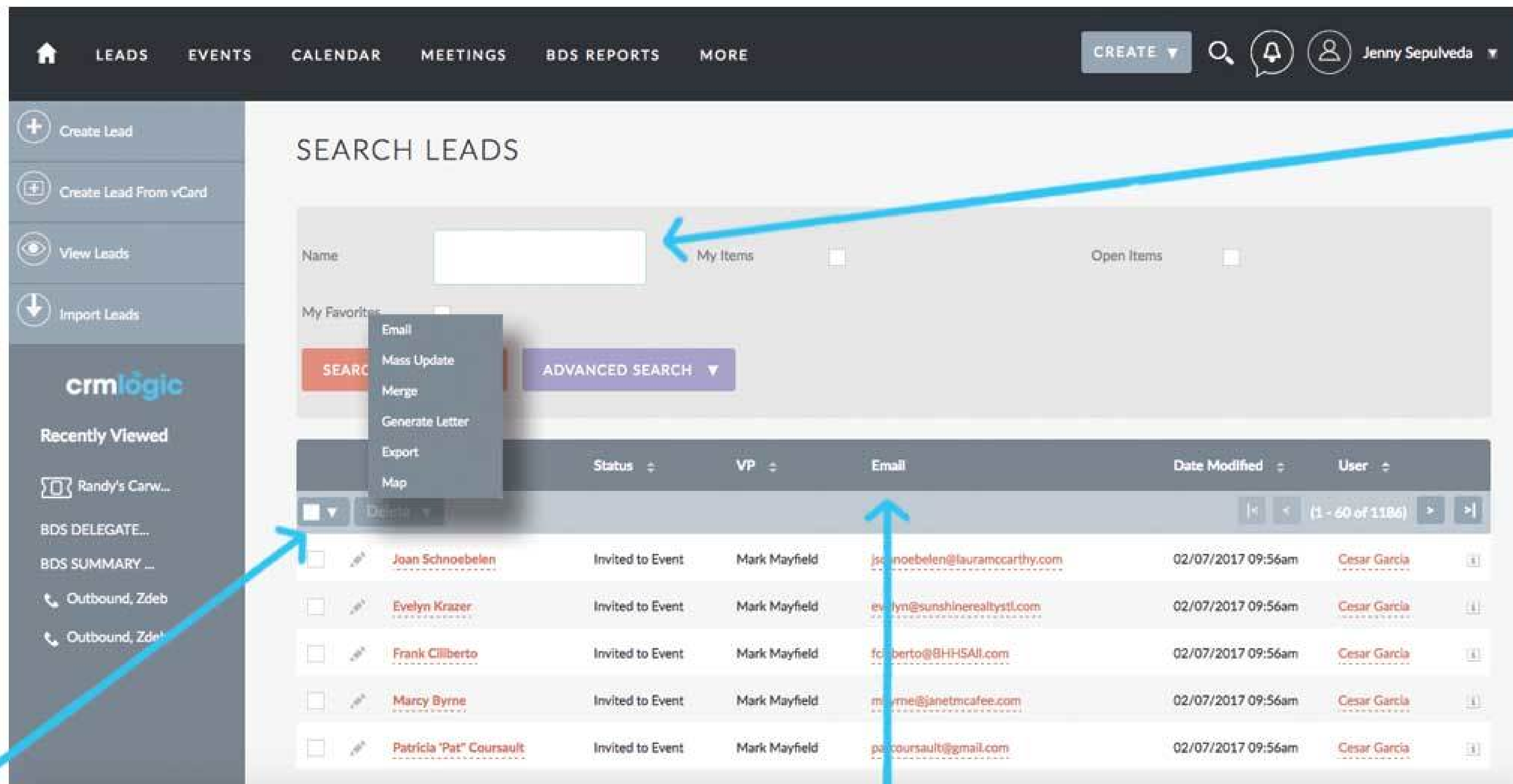
Leads Overview

Viewing Your Leads

In the Leads tab you will be able to view and sort your leads based on Status, VP, Date Modified, etc...

Create & Import Leads

Add an individual Leads or import multiple leads at once using the Create and Import tools.



Search Leads

Use the search box to find specific Leads. Remember to clear out the search box and hit enter to view all of your Leads again after searching.

Mass Update

Click on the check boxes to select individual Leads or click on the top check box to select all Leads. Then click on "Delete" or the triangle to export, merge and more.

Filter Options

Click on the title in each column to filter by individual categories.

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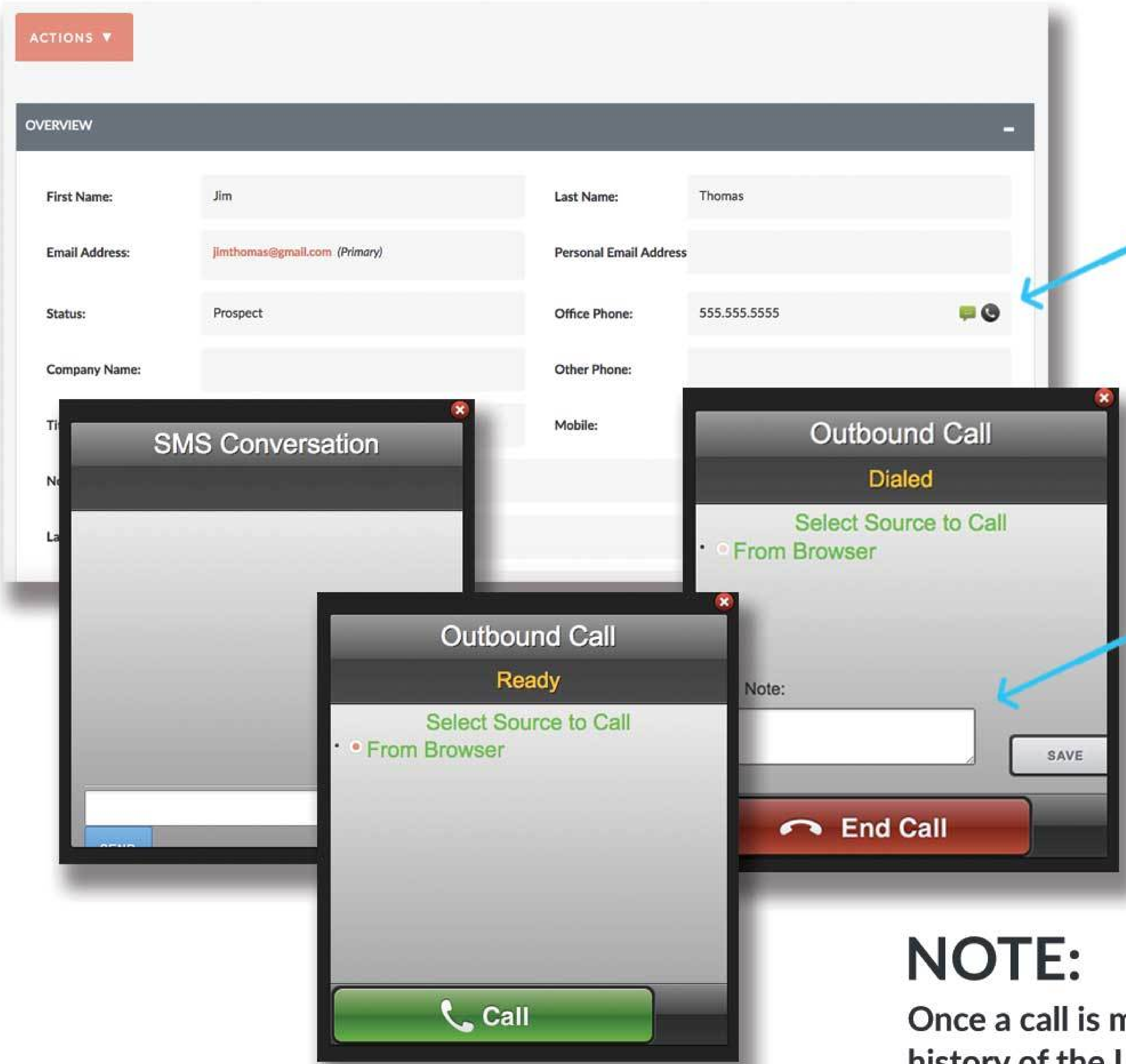
USING THE SYSTEM

Calls / Dialer



Calls & SMS Messages

Click on the icons next to a Leads phone number to start a Call or SMS text message.

Making a Call

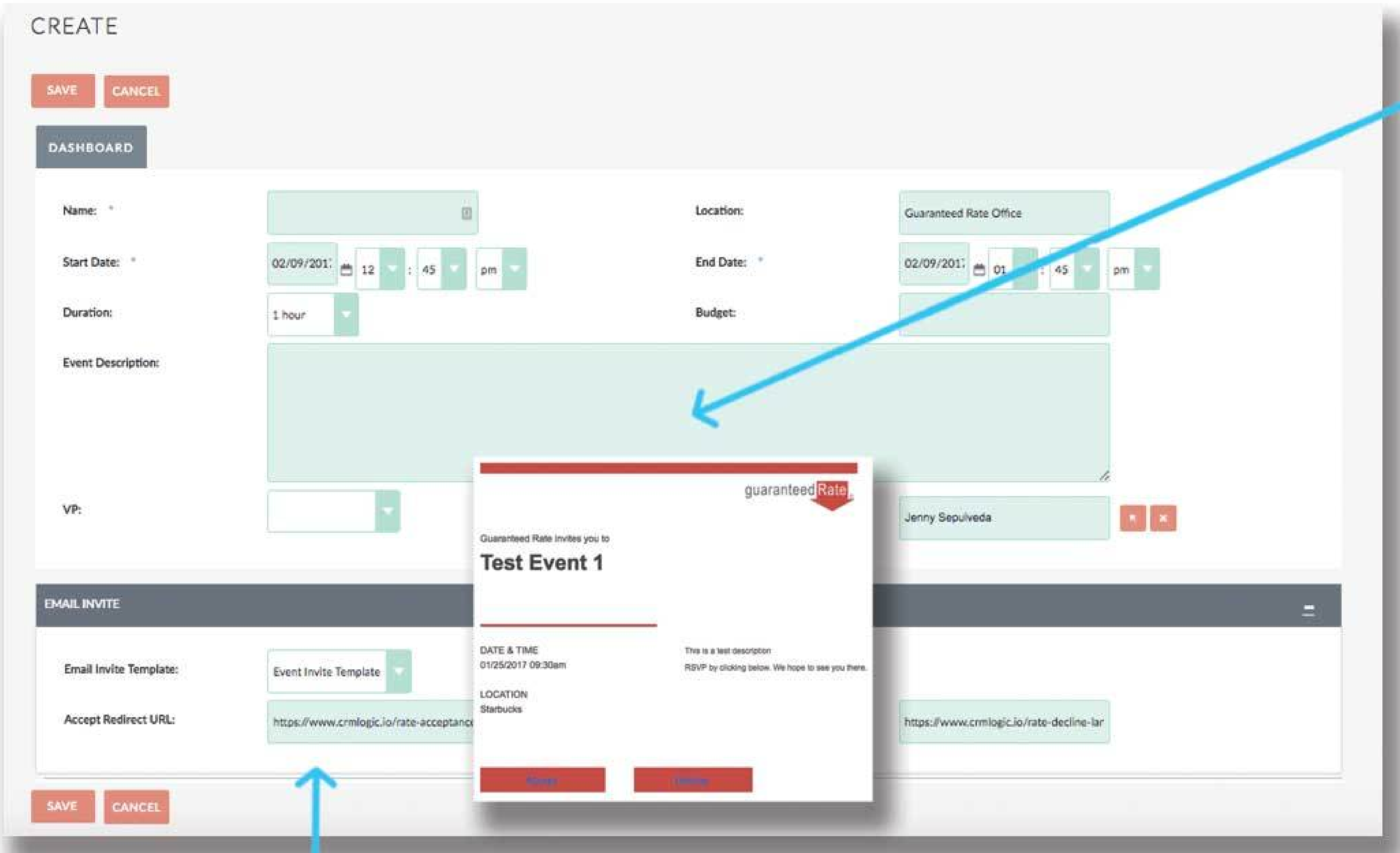
Select “From Browser” and click ”Call”. Once on the call you can add notes that will automatically be added to the Leads history.

NOTE:

Once a call is made it is automatically logged in the history of the Lead.

USING THE SYSTEM

Creating Events



Filling Out Information

Fill out all of the required fields including Name, Date, Time, etc... In the description box you can add html mark up if you wish.

It's important to make sure that all information is filled out. Anything that you put in this section will be emailed directly to your invitees.

Use Email Templates

Make sure to select an email template so that your invitees receive an ascetically pleasing email invite. If your using Eventbrite you can swap out the Accept Redirect URL with the Eventbrite event page instead.

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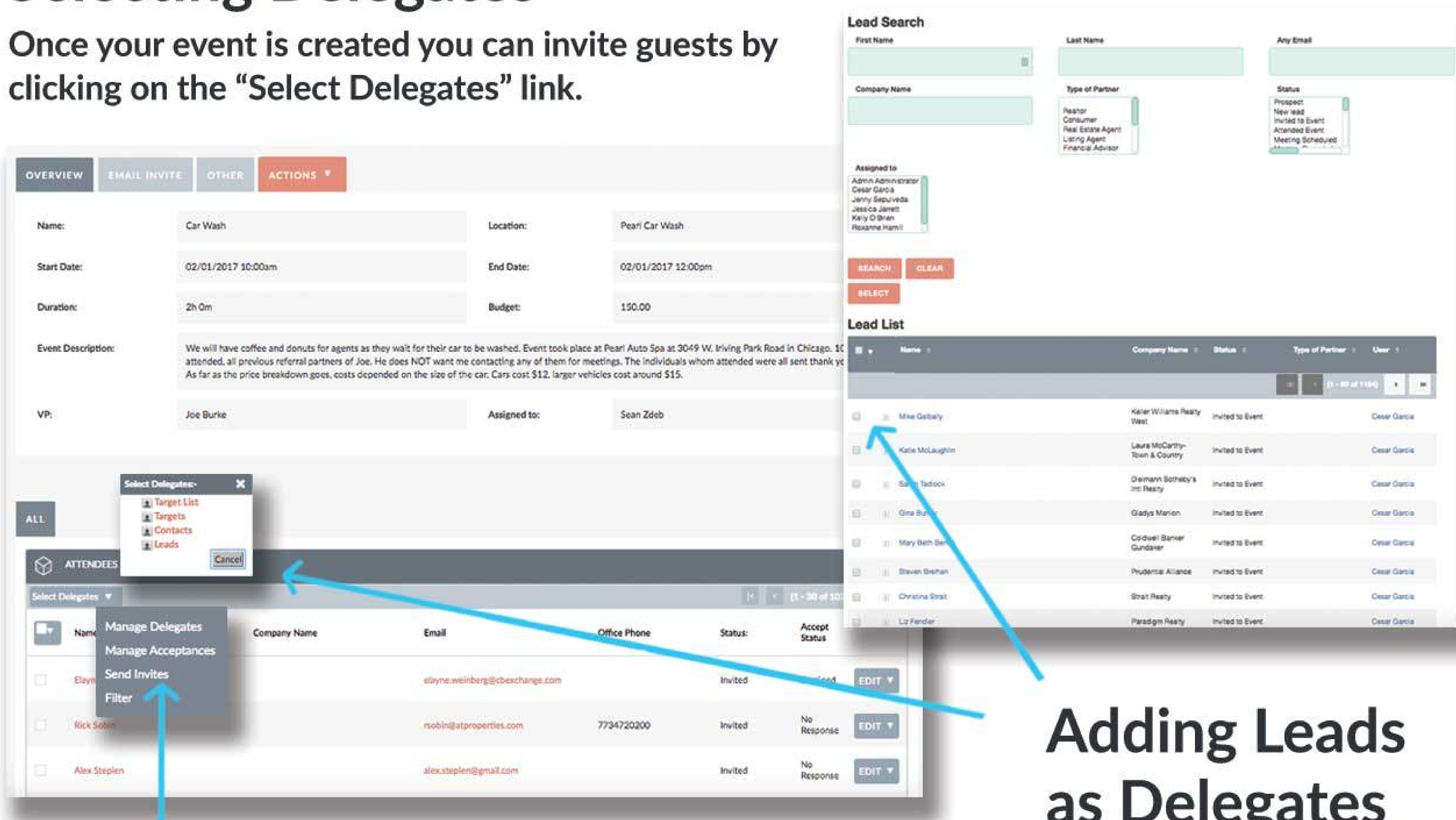
USING THE SYSTEM

Inviting Attendees to Events

Selecting Delegates

Once your event is created you can invite guests by clicking on the “Select Delegates” link.



Adding Leads as Delegates

Click on “Leads” and then use the check-boxes to select all of the Leads that you wish to invite to your event. Make sure to save your selections by clicking the “Select” button in red.

Sending Invites

Use the select all check box and then click the down arrow to expand the menu then click on “Send Invites”. Attendees statuses will automatically update based on their responses. You can update them manually in this menu as well.

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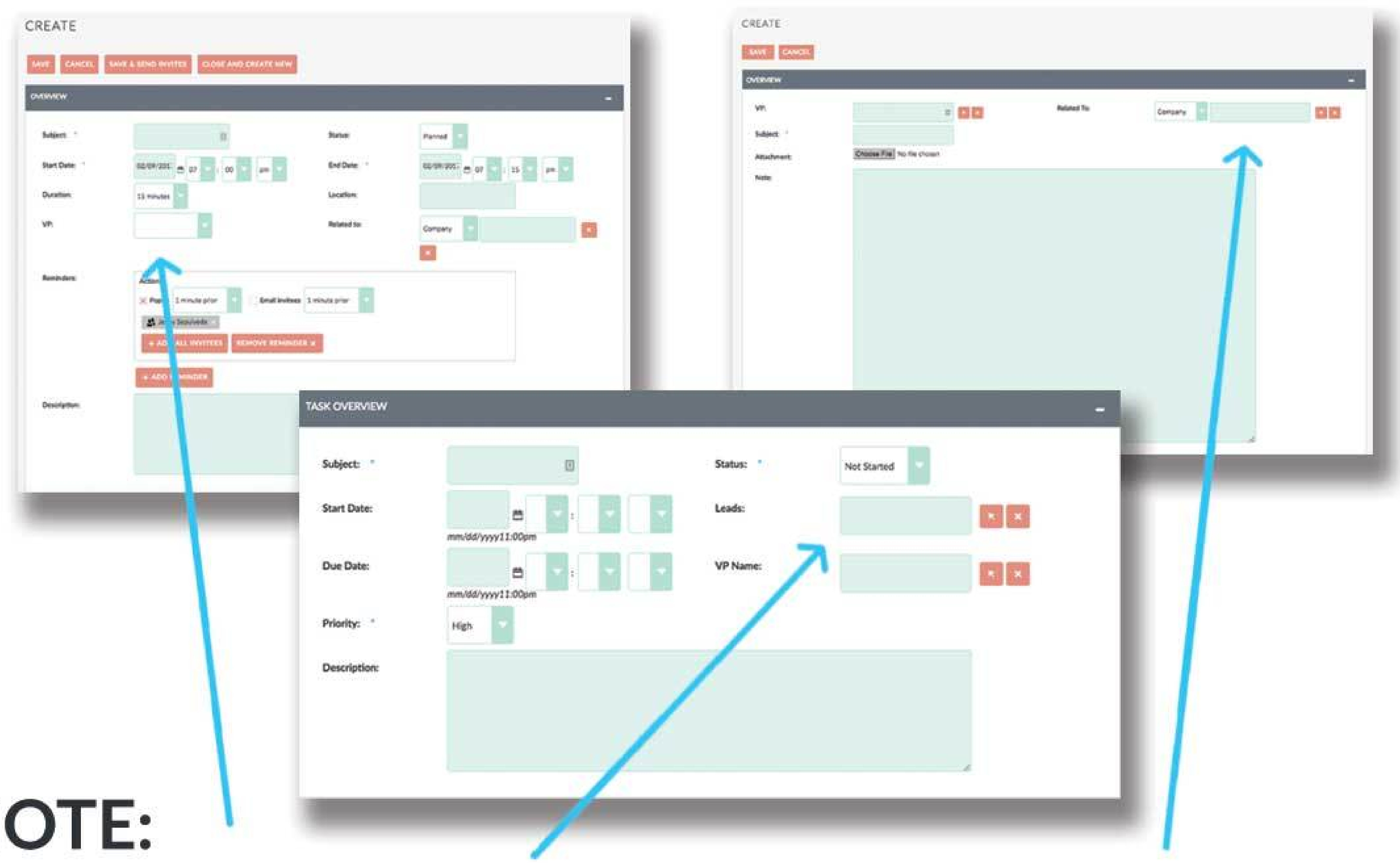
USING THE SYSTEM

Meetings, Tasks & Notes

Creating Meetings, Tasks & Notes

Create and schedule Meetings, Tasks & Notes by filling out the required fields. Your actions will be updated in the Leads history as well as your dashboard.



NOTE:

Make sure to include your VP and the Lead that the action is related to in order to get proper reporting.

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USING THE SYSTEM

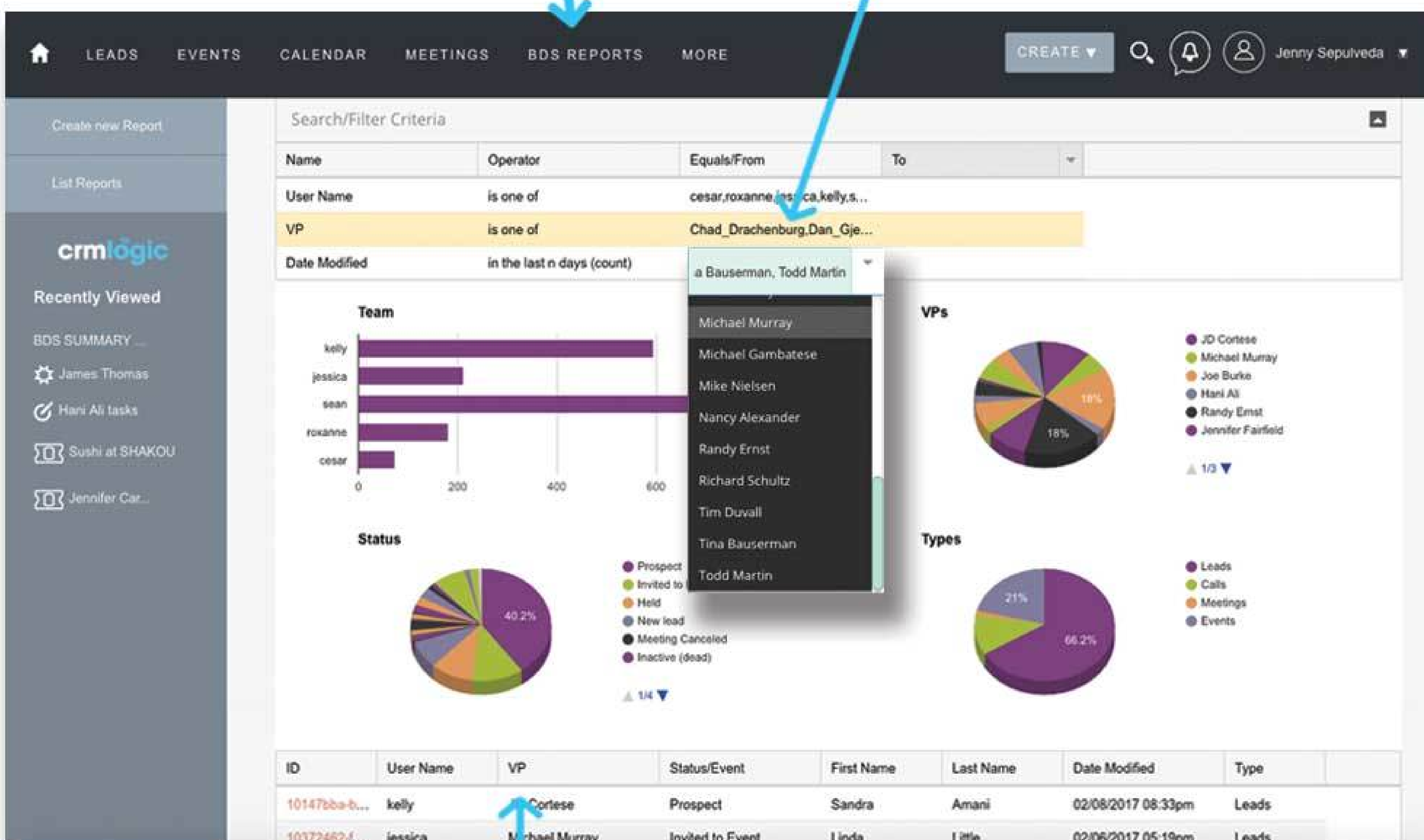
Reporting

BDS REPORTS

Track your progress using the BDS Reporting tool.

FILTER BY VP

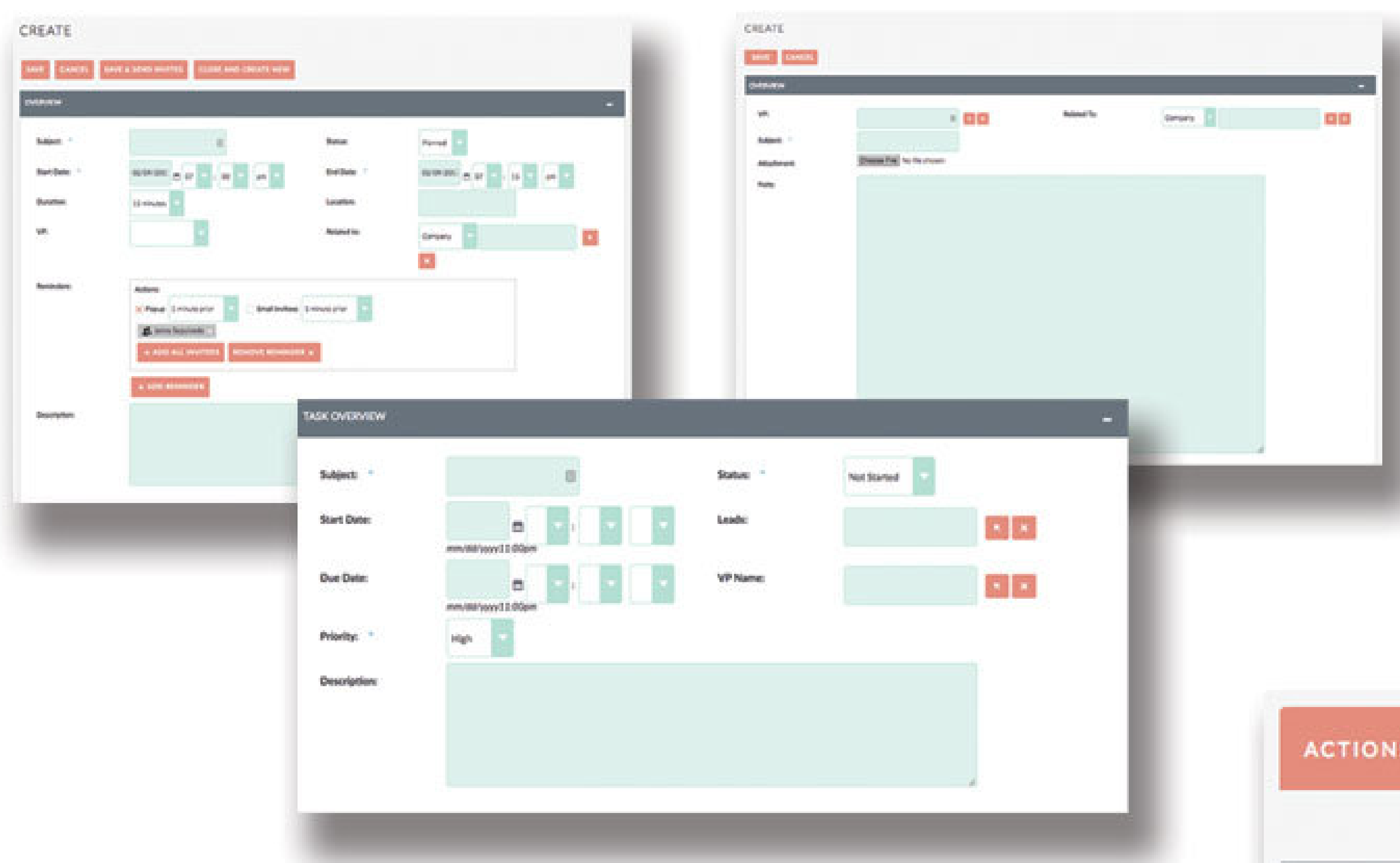
Select individual VP's from the drop down menu to narrow down your results.



SORTING

You can also sort your results by clicking on the category title.

ACTIONS VS STATUSES

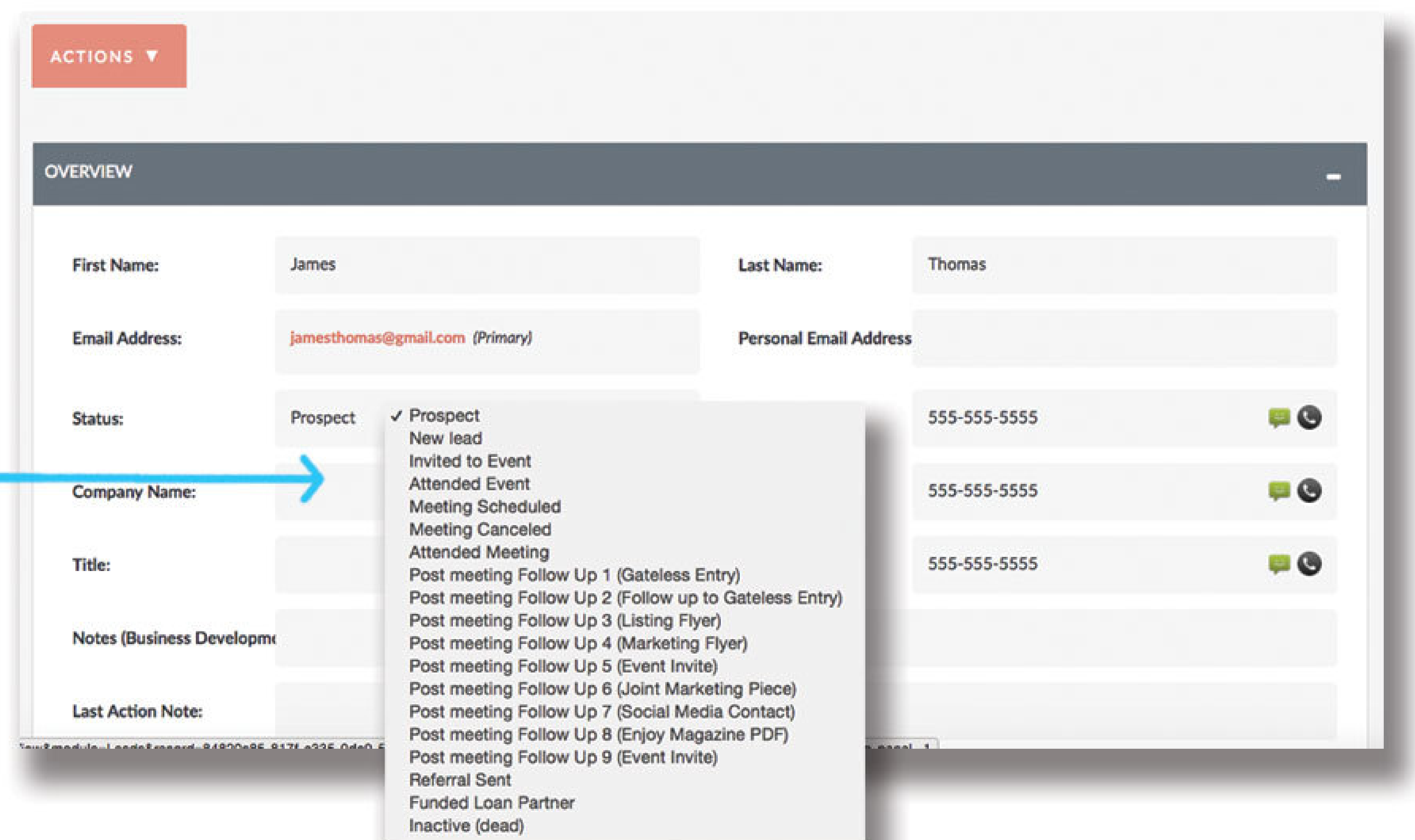


Creating Actions

Your daily obligations such at Calls, Meetings, Tasks, Notes, Etc... are all considered Actions. Logging all of your activities will ensure that you have accurate reporting.

Updating Statuses

After each Action you will want to update the Leads Status to reflect the accurate step in the sales work flow. This will allow you to track your progress on developing a Lead.



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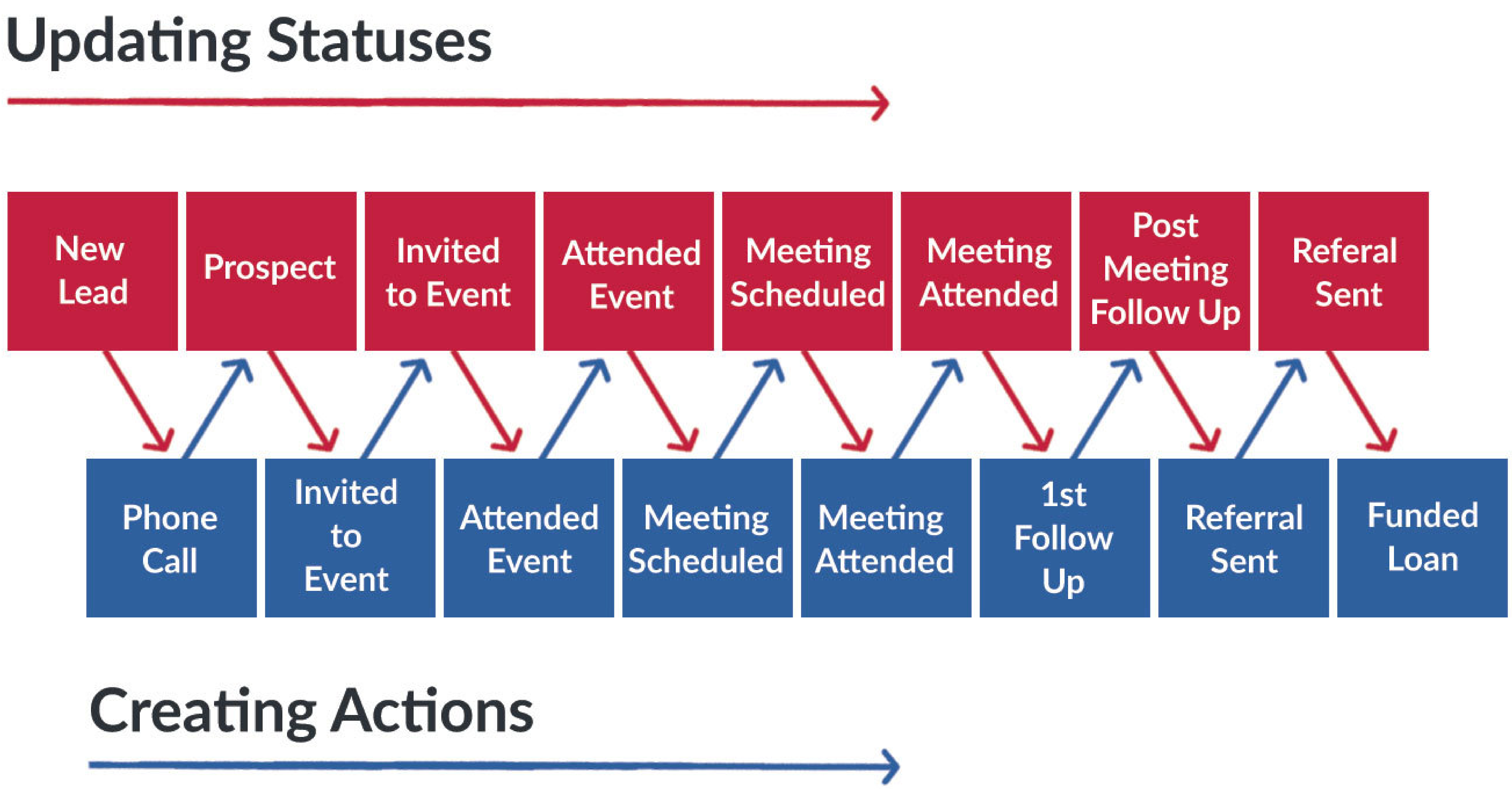
ACTIONS VS STATUSES



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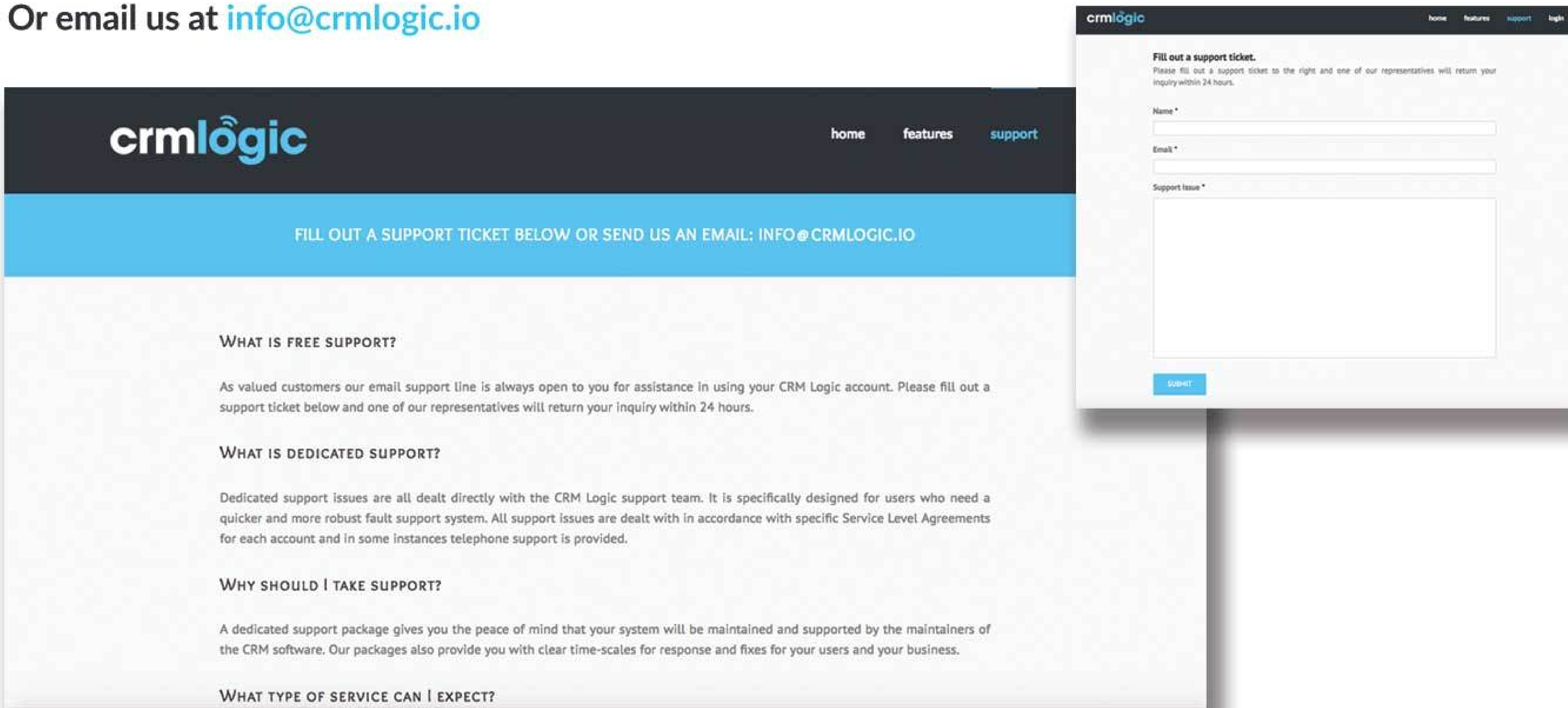
USING THE SYSTEM

Support & Demonstrations

We're Here to Help!

Have a question about using CRM Logic? Simply fill out a support ticket on our website at www.crmlogic.io/support and one of our support specialists will get back to you right away! Or email us at info@crmlogic.io



Live Demonstrations

If you'd like to schedule a live demonstration of the system please email us at info@crmlogic.io.