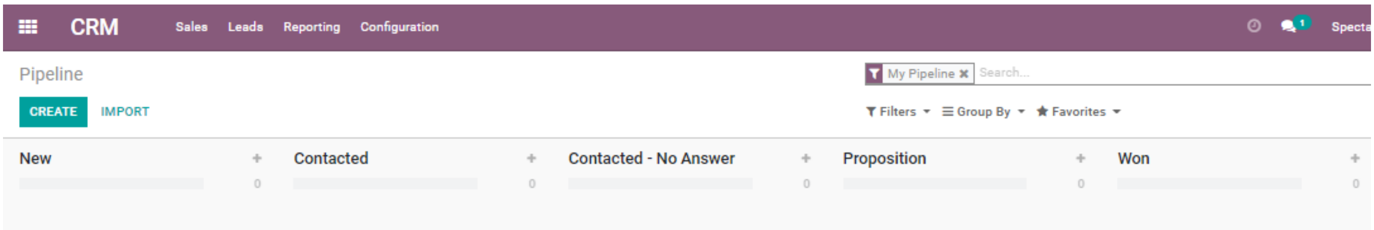
Training Manual

Humint O Lite
Version 16

CRM

CRM (Customer Relations Management)

- When you open the Icon, it will open the CRM Module to this page.



- It will always show the leads that are assigned to you first

If you would like to view all the leads, click on the X next to My Pipeline in the search bar, and it will show all the leads in the stages.

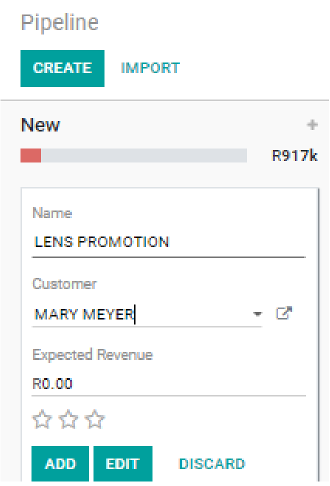
- Stages of the Leads

  You move the Leads between the stages to ensure that you know when to follow up and that you can do reporting to determine which platform/advert is working and how much income you are generating from a specific advertising campaign. The below represents an example of the stages you may use in a CRM pipeline, but it is by no means set in stone. Stages and behaviours in these stages are completely customisable.

- NEW – All new leads will be represented first in this bucket. Leads can have many sources. Some examples are Facebook, email, website, and telemarketing
- CONTACTED – This stage may represent an initial contact made with the customer, but not enough info to make a proposition. Reminders can be set to follow up on any questions the potential customer may have.
- CONTACTED - NO ANSWER– Initial contact was unsuccessful. You can set a reminder to phone again and set up an Automated email to be sent to the patient as soon as you move it to the No Answer Stage. This will ensure the patient that you are following up on his/her Lead and give them an opportunity to contact you.
- PROPOSITION – This is where you put the Lead when the patient has made a commitment. Moving a lead into this stage could automatically generate an email with a standard offer or quotation. You can add the estimated revenue value here.
- WON – Marking a contact as won will close the Lead. Generated revenue can also be captured, so that post analysis and reporting can be done to help improve the pipeline process.
- LOST - A lost Leads is an unsuccessful lead. This could be for a variety of reasons, and these can be recorded to improve the marketing process.

You can also create NEW Leads when you phone a patient, and they refer a friend or make an appointment for themselves and another person. You can then track both revenues separately.

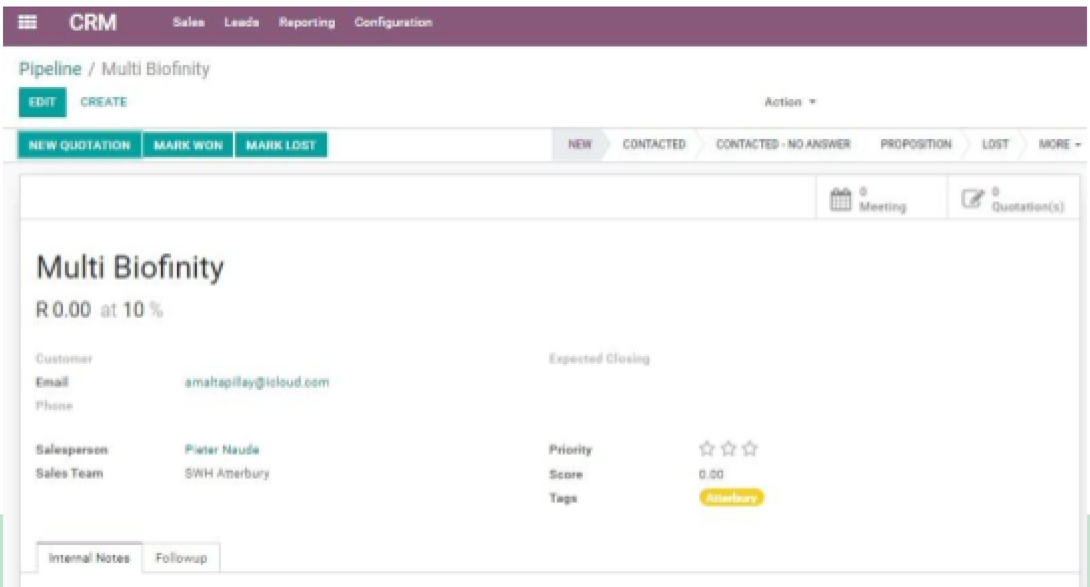
Click on CREATE then this window will open



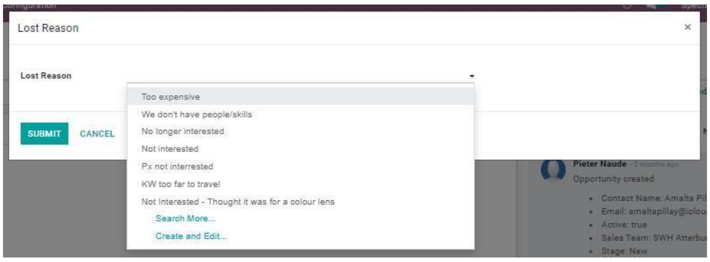
- Name – The name of the promotion that the patient is interested in
- Customer – Name of the potential patient
- Expected revenue – If you know what the patient wants to spend, you can enter the expected revenue here.
- Click on EDIT if you wish to open the Lead and add additional information.

Processing a lead:

When you open a lead, the form will look like below:

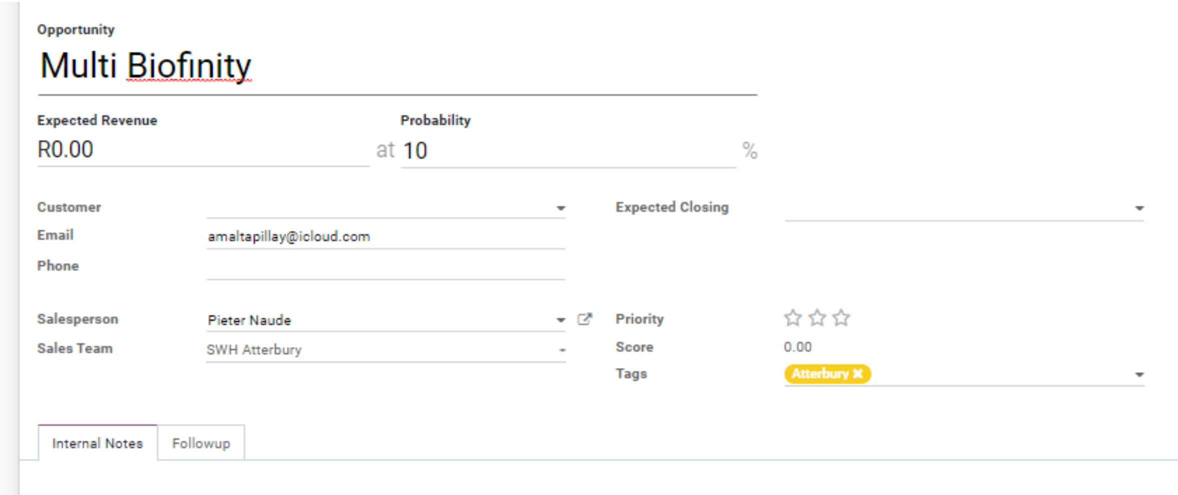


- New Quotation
- Mark WON
- Mark LOST – If you move the Lead to the LOST stage, you will see this window that will ask you for a reason why the Lead is lost.
  You can CREATE reasons, or you can choose one of the reasons on the list. As on the other modules, you can also search for more reasons if the one you want to choose does not show up in the dropdown list.
  Press SUBMIT when done.



To start processing the Lead, you will have to click on EDIT.

You will see the different stages are outlined in the top right corner. You can click on the stage to change it. Remember that certain stages may have automated functions set up like an email that goes to the patient if you place the Lead in the "Contacted, No Answer" stage.

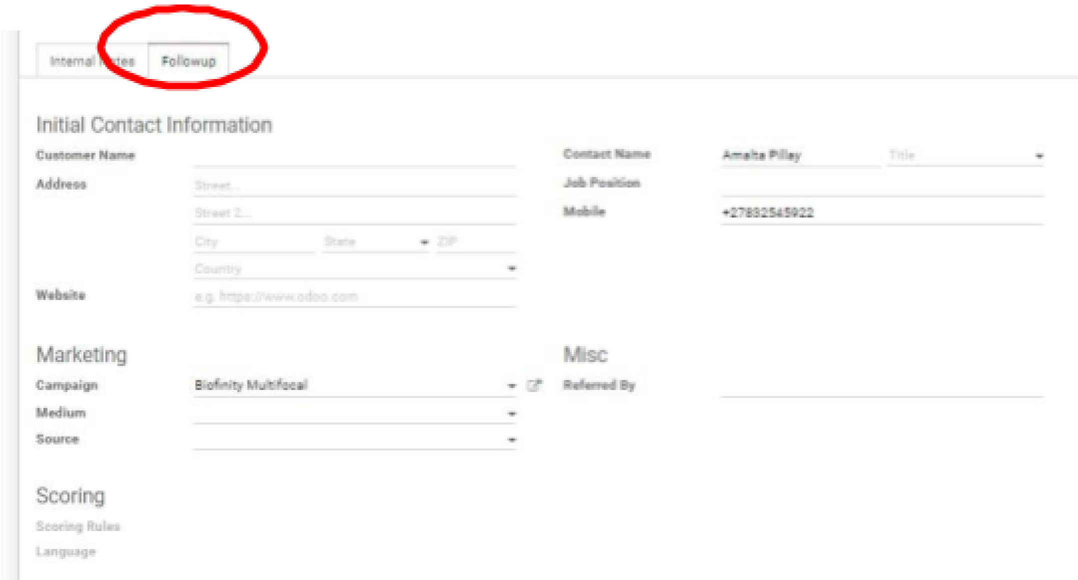


Once you have pressed EDIT, you will be able to edit and save the fields you change.

- Opportunity – This is the name of the Lead
- Expected revenue – What you expect to invoice from that sale (You usually only put in the amount when moving a lead to “Proposition”, then changing the amount to the actual spend when you move the Lead to the WON stage.)
- Probability – This indicates the possibility of reaching your expected revenue with that Lead. It changes according to the stage. These probabilities can be customised. The below is an example.
  In New - 10%, Contacted - 30%, Contacted, No Answer - 30%, Proposition - 70%, Won - 100% and Lost - 0%.
- The customer isn't listed here. The customer information will be listed under follow-up. Only once you quote, invoice, and add the potential client to your contacts, then only will the patient be listed under customer.

- Email – Email address filled in by the patient
- Phone – The number can also be entered here once you have the patient
- Expected closing - This can be used when the sale is linked to a specific date e.g., booking of an eye test.
- Salesperson – The person tending to the Lead
- Sales Team – Teams can be created to better organise the sales effort. Leads can then be assigned to specific teams.
- Priority – This can be set by clicking on the stars
- Tags – Here, you can add your tags. This is for reporting purposes.
- Internal notes – You can make notes on the patient file here

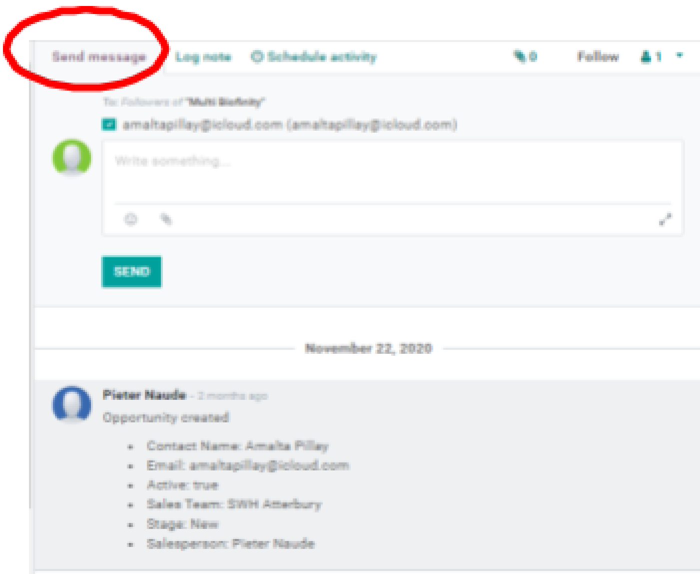
- Follow up:



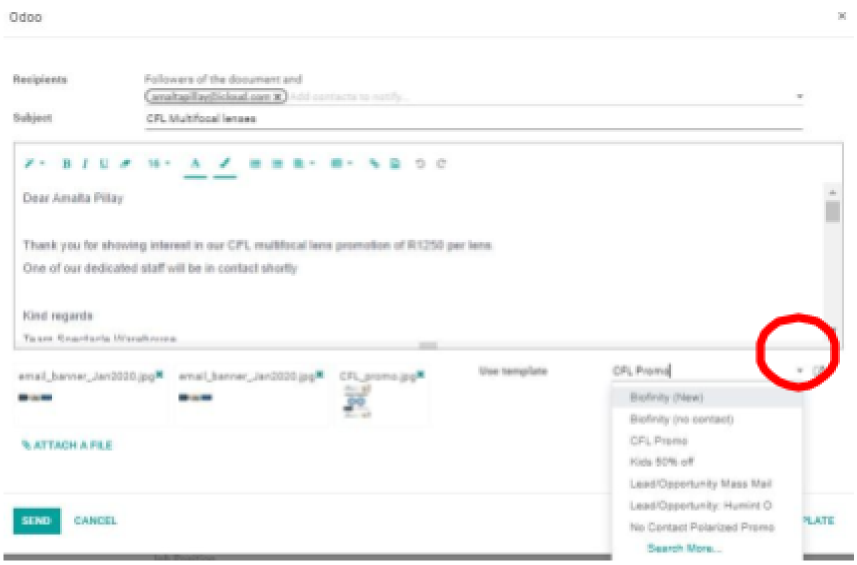
The Contact Name and Mobile will pull through from the lead form, but the rest of the information you can get when the patient wants to become a customer. Only then will they reflect on your contacts database.

Notes and Communication:

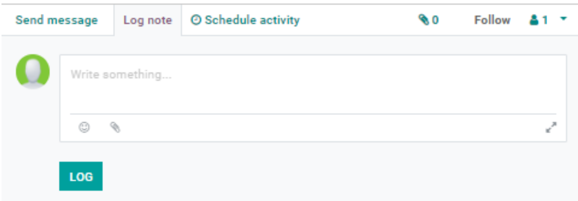
- The chatter screen will show, either at the bottom of your screen when you scroll down OR on the right-hand side. This depends on the width of your screen.
- Send message:
  You can send an email to the patient from here.
  You can type a specific message or use a set template



The template can be found if you click on the arrows in the bottom right corner.

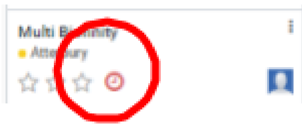


- You will see a blank email when you open the external link, but once you click on the dropdown list in the bottom right, you will see the available templates.
- You can add signatures and attachments of the Product.
- You can create follow-up emails, educational emails about the promotional Product, and so on.
- Log Note: This function is to log notes to stay informed on the leads when you need to follow up. Notes are internal and not seen by the patient.
- Once you have typed, click on LOG.



- Schedule Activity: This is one of the most essential functions of CRM. Here you can set reminders for when to follow up on leads. These reminders will filter your daily leads so you can focus on the most urgent first.

  The Lead has a little clock on the card in the Kanban view of the CRM module.

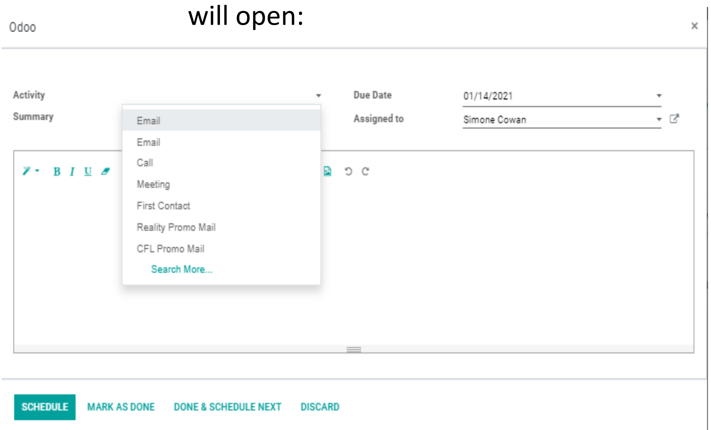
  The clocks mean different things depending on their colour.

  RED - Overdue, Follow up ASAP.

  YELLOW - Need to follow up that day

  GREEN - You don't need to give attention to that Lead on that day.

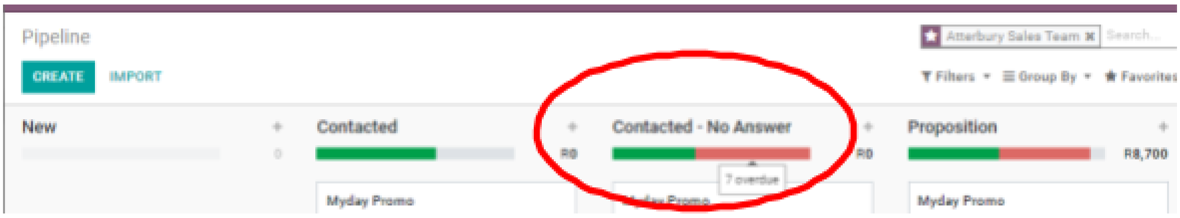
  Click on Schedule Activity, and this screen will open:



Choose the Activity that you want to be reminded for.
E.g., follow up, phone again, email
You can create some to choose from a dropdown list. Choose the date that you want to be reminded of.
E.g., If you phone a lead and they do not answer, you set a

reminder to try and phone again for the next day.
Type your reminder message and click on SCHEDULE.

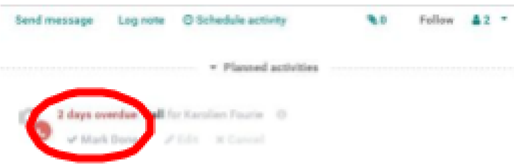
Once you have set your reminders, it will reflect on your Main screen, and you will see what to follow up first. The BARS indicate the Leads with reminders. If you hover over the bar, you will see the number of leads. E.g., Contacted, No Answer – 7 days over-due.



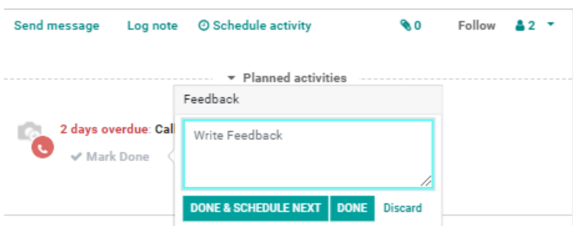
If you click on the colour, it will only display the leads falling in that category. (Like applying a filter)

Once you have opened and followed up on a lead with a reminder, you would either reset the reminder for a later date OR Mark the reminder as DONE.

Your reminder will look like this:



Once you click on – Mark Done, there will be a pop-up window asking for details of the follow-up and giving you the option to set a new reminder or simply mark this one DONE.



Write Feedback – Here, you can say what the outcome of the follow up was,

E.g., DONE – Patient is not interested anymore.

DONE & SCHEDULE NEXT – Patient wants us to contact them at Month-end.

The entire history of the Lead will also reflect here.

(Either on the right-hand side of your screen or right at the bottom if you scroll all the way down.)

The newest date will reflect on top as well as reminders.