SalesDesk System Update

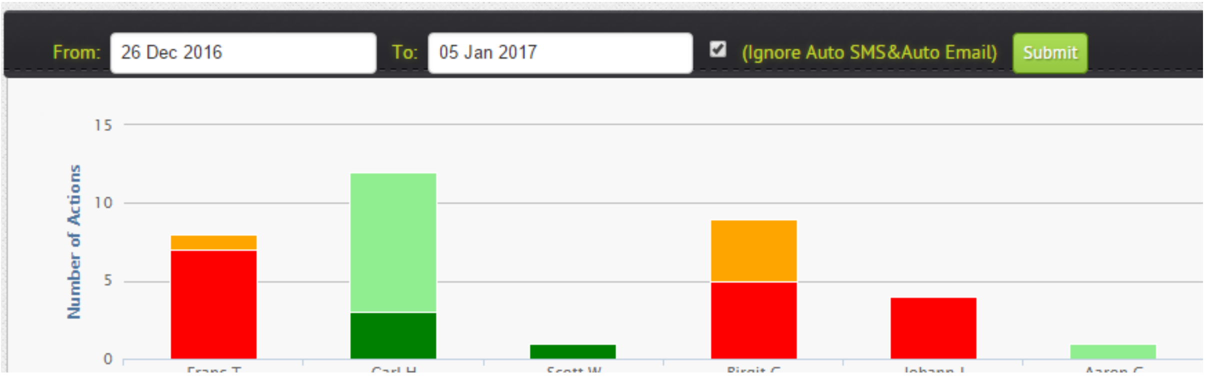
January 2017

Three new features make up the core of our SalesDesk system update for January 2017.

A slight change in look and feel will take place however we believe this will not cause any confusion to users as the core elements of lead list, action list, and lead profile remain.

These new features are outlined below.

Activity Summary Chart



You rely on your team to complete lead follow up.

Ensuring active prospects are being nurtured is a key part of the sales process. Therefore it's important that a sales manager can quickly "check in" on the follow up progress of the team.

The activity summary report quickly illustrates team follow up activity including how many calls or actions have been completed on time, how many actions have been completed passed the due date, how may actions have been removed and how many actions have not been completed.

The activity summary chart highlights the activity of each sales person in your team.

Colour code key

Green- Completed on time

Light Green- Completed after due date

Orange- Deleted

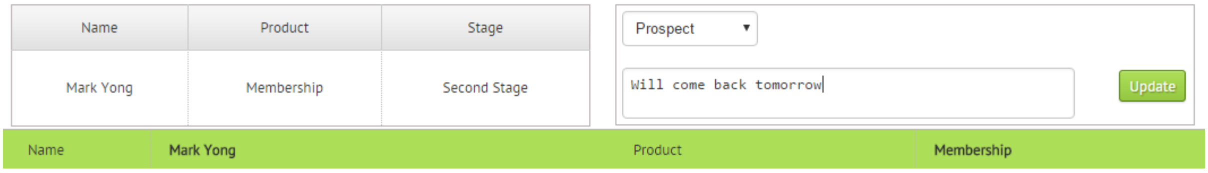
Red- Not completed

Previously, you could search activity using the activity report however this would only outline what had been completed. It would not provide clarity about how many of the scheduled actions have been successfully completed.

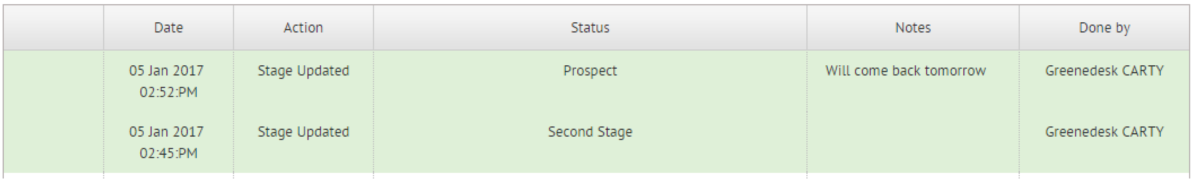
The activity summary chart provides managers with a quick dashboard snapshot of action follow up so they can ensure that all leads are being correctly nurtured.

Buying Stages

It is important to know where a prospect is in the buying process. Perhaps they are in the decision making stage or perhaps they have only made an enquiry. It is important to be able to quickly view and track the stage of buying for each prospect.



The new stages feature of SalesDesk allows sales consultants to record the buying stage of each prospect. The buying stage can be updated from within the lead profile or via the new lead preview feature.



	Date	Action	Status	Notes	Done by
	05 Jan 2017 02:52:PM	Stage Updated	Prospect	Will come back tomorrow	Greenedesk CARTY
	05 Jan 2017 02:45:PM	Stage Updated	Second Stage		Greenedesk CARTY

Lead stage updates will be logged in the lead activity section of the lead profile.

There is also a notes section to record more specific stage related notes.

From the lead list you can filter by lead stage to identify leads at a specific stage of buying. This is helpful to track the number of leads at a certain stage.

There is also a new automation trigger for lead stage via the actions menu. This trigger will allow you to establish automated communication sequences based on the stage of buying for a prospect. This allows your automated communications to be even more relevant.

Closing a sale

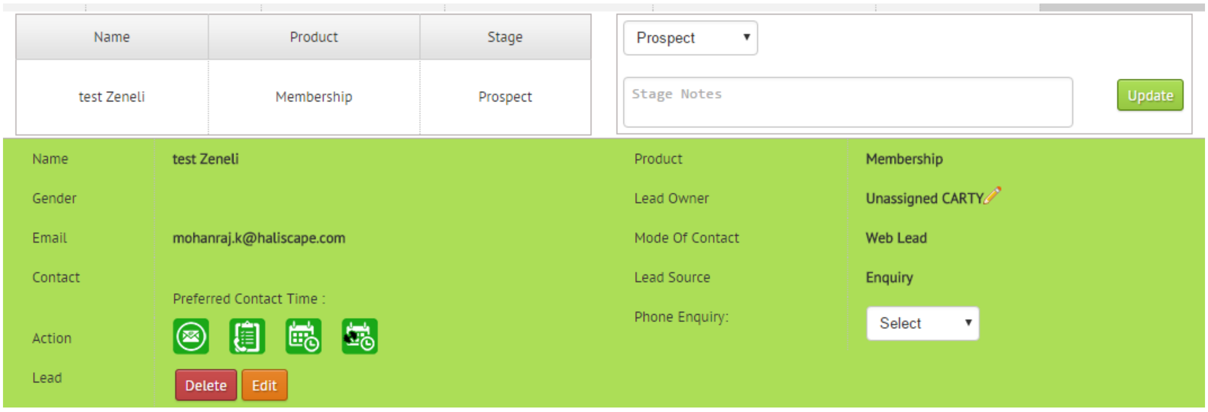
Closing a sale will now take place via the stages feature. To close a sale, simply select closed from the stages drop down and submit.

Quick Access Summary from Lead and Action List

One of the frustrating aspects of previous versions of SalesDesk is that you would need to open a leads profile to dig deeper and find further information such as tracking history, previous follow up etc.

The new quick access feature allows you to slide open a summary of this important information without leaving the lead or action list.

To do this you simply need to click the circle icon at the start of a lead in the lead list. This will allow you to slide open and close the summary page helping you find the specific information you are looking for without having to leave the lead or action list.



Need Help?

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