

Sales CRM Webinar

Customer Relationship Management

Today's Agenda

- Sales CRM Features
- Adding Prospects
- Contact History
- Member / Guest Call Tracking
- Salesperson Scheduler
- CRM Reporting

Sales CRM Features

- Analyze and manage customer interactions to improve relations and retentions
- Enable your staff to effectively engage all Prospects & Guests leading to a higher member conversion
 - Quickly add prospects to Shape
 - Track and manage email and calls to and from prospects
 - Track the sales stage
 - Sales specific scheduler available
 - Report on the effectiveness of your staff

Adding Prospects

- **Quick Functions >> Quick Add or Functions >> Sales CRM >> Add Prospect/Guest**
 - Allows you to easily capture prospect information
 - Consider adding relevant information about potential sale in the Notes area

Prospect Basic Info

First Name:	<input type="text"/>	Referred By:	<input type="text" value="Other"/>	
Last Name:	<input type="text"/>	Sales Rep:	<input type="text" value="Select..."/>	
Phone:	<input type="text"/>	<input checked="" type="radio"/> Cell	<input type="radio"/> Work	<input type="radio"/> Home
Email:	<input type="text"/>			

Notes

Prospect Details

- **Functions >> Sales CRM >> Search Prospects/Guests**
- **Select Details under the actions column**
- **Miscellaneous area**
 - Ability to set the Sales Rep, Expected Close Date, Sales Probability, and Sales Forecast
 - Link Prospects joining together to display on contact history screen

Miscellaneous

Company Name: Capital Health	Occupation: Nurse	
Expected Close Date: 5/31/2017	Sales Probability: 0%	Sales Forecast: \$500
Sales Rep: Cole-Dani		
Linked Prospects:	<input type="text" value="Smith-John"/>	

Prospect Details

- **Categories**

- Customizable – add interests (classes, pool, personal training), current gym, etc.
- Query on categories for sending mass emails
 - Ex. Prospect didn't join because Yoga wasn't offered – if added in the future, email everyone that didn't join because of it
- Displays on Sales CRM Reports

Categories			
<input type="checkbox"/> 3.5	<input type="checkbox"/> fit club	<input type="checkbox"/> Ladies Club	<input type="checkbox"/> Silver Sneakers
<input type="checkbox"/> ACHIEVE THERAPY	<input type="checkbox"/> FLHOSP	<input type="checkbox"/> Martial Arts	<input type="checkbox"/> Skateboard
<input type="checkbox"/> Baycare	<input type="checkbox"/> GREEN CHILE	<input type="checkbox"/> NFCC TRAINING	<input type="checkbox"/> Social
<input type="checkbox"/> BEN GOLF	<input type="checkbox"/> Gym Only Member	<input type="checkbox"/> NUT ALLERGY	<input type="checkbox"/> Student at CSUF
<input type="checkbox"/> BLUE SCHOOL	<input type="checkbox"/> Gymnastics	<input type="checkbox"/> NYAC	<input type="checkbox"/> SUTTON
<input type="checkbox"/> BP	<input type="checkbox"/> HERITAGE	<input type="checkbox"/> Pickles	<input type="checkbox"/> TENNIS PRO 2
<input type="checkbox"/> BRIAN	<input type="checkbox"/> HOSPITAL EMPLOYEE	<input type="checkbox"/> PROFESSOR	<input type="checkbox"/> Tournament
<input type="checkbox"/> CARDIAC	<input type="checkbox"/> HYPERTENSION	<input type="checkbox"/> S	<input type="checkbox"/> Train Your Brain
<input type="checkbox"/> CIRCUIT CLASS	<input type="checkbox"/> interclub	<input type="checkbox"/> Scooter	<input type="checkbox"/> Training Client
<input type="checkbox"/> DIABETES	<input type="checkbox"/> Interested in Zumba	<input type="checkbox"/> SHY	<input type="checkbox"/> TRIATHALON

Contact History

- Functions >> Sales CRM >> Search Prospects/Guests or Quick Functions >> Find User >> Search on Prospects or Guests
- Select Contact History under the actions column
- Choose “Log Contact Event”
 - Allows you to easily track contact with prospects - adding results and the sales stage
 - Set future contact date for follow up reminders
 - Consider adding relevant information about potential sale in the comments area

Prospect Id: Tomtom-Pam Save

Contact Priority: High

Action:

Result:

Sales Stage:

Next Contact Date: Next Contact Date Not Required

Best Call Time:

DO NOT CONTACT. (?)

Contact Priority: (?) Alert on Check-In Screen: (?)

Comments:

Contact History

- **Linked Prospects**
 - Set in the prospect user details screen
 - Allows you to group prospects together (spouse/family)
 - Displays on contact history screen
- **Strategy**
 - Set in the contact history screen
 - Add prospect interests and any promotions that are being offered to the prospect

Linked Prospects			
Smith-John			
Actions	Last Update	Updated By	Strategy
Edit Strategy	4/24/2017 6:43:24 PM	ShapeAdmin	Spring Special 3 months @ \$59.99, expires 4/30

Prospect/Guest Calls

- **Display in the Alert Center on the home page**
 - Future Calls and Missed Calls available
 - Updated by the next contact date in contact history
- **Functions >> Sales CRM >> Prospect/Guest Calls**
 - Query:
 - Active prospects or guests
 - Scheduled Calls for today (prospect or guest)
 - Missed Calls (prospect or guest)
 - Future Calls (prospect or guest)
 - Send mass emails from list

Alert Center [\(Edit\)](#)

Future Calls(3)

Missed Calls(126)

As of: 04/24/2017

[Generate Mailing Labels](#) | [Generate Mass Email](#)

Actions	Prospect	SalesRep	Priority	Last Contact Date	Last Contact Action	Last Contact Result	Next Contact Date	Phone Numbers	Notes	Referred By	PrimaryGoal MemberType
Contact History Member Details Send Email	TARRY-LAURA		High	04/24/2017	Appointment Completed	N/A	05/08/2017	W: (630) 2753488	Wants to bring spouse back next week.; ApptId[165], SchedStartDate[4/24/2017 5:00:00 AM], SchedEndDate[4/24/2017 6:00:00 AM], Type[Tour], Action Status[]	Member	

Salesperson Schedule Matrix

- **Quick Functions >> Salesperson Schedule Matrix or Functions >> Scheduler >> Salesperson Schedule Matrix**
 - Ability to track and manage all non-revenue generating appointments for prospects, guests, or members
 - Set appointment type (customizable - tour, free class, trial assessment, etc.)
 - Completion of the appointment updates contact history

Appointment Details	
Appointment Status:	Done
Sales Person:	Hale-Gabe
Start Time:	4/24/2017 5:00:00 AM
End Time:	4/24/2017 6:00:00 AM (60 minutes)
Appointment Type:	Tour
Attendee Description:	Prospect: TARRY-LAURA View Contact History
Scheduled Notes:	Touring the facility with spouse



<input type="checkbox"/>	4/24/2017 8:04:24 PM	Appointment Completed	N/A		Hale-Gabe	Wants to bring spouse back next week.; ApptId[165], SchedStartDate[4/24/2017 5:00:00 AM],
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Sales CRM Reports

- **Reports >> Sales CRM >> Prospect/Guest Analysis**
 - Snapshot of current prospects and guests in the system
 - Ability to query on the expected close date, current sales stage, sales rep, and category
 - Ability to send a mass email from the list and download to Excel
 - Best practice: set current sales stage to focus on prospects that are ready to close or recall information from people that were at one time interested in your services for marketing

Sales CRM Reports

- **Reports >> Sales CRM >> Prospect/Guest Management**
 - Used to track the in and out bound conversations of your sales team on a weekly basis
 - Ability to query on different time frames and drill into the details
 - Displays leads, referrals, calls received, emails received, scheduled appointments, etc.
 - Drill into each week to see specific details

Last Month - 3/1/2017 to 3/31/2017  

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<u>Week Starting</u>	<u>Contacted By</u> ?	<u>Leads Added</u>	<u>Referrals</u>	<u>Walk Ins</u>	<u>Total Calls</u>	<u>Calls To Members</u>	<u>Email Sent</u>	<u>Call Received</u>	<u>Email Received</u>	<u>Scheduled Appt</u>	<u>Completed Appt</u>	<u>Sales</u>
3/25/2017	best-pete	0	0	0	0	0	0	0	0	1	1	0
3/25/2017	hind-eric	1	0	0	0	0	1	0	0	0	0	0
3/04/2017	hind-eric	1	0	0	0	0	0	0	0	0	0	0
Totals:		2	0	0	0	0	1	0	0	1	1	0
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Sales CRM Reports

- **Reports >> Sales CRM >> Prospect Sales Probability Analysis**
 - View the sales probability of your prospects
 - Each prospect user record has a field for sales probability under the miscellaneous field

Sales CRM Reports

- **Reports >> Sales CRM >> Prospect/Guests Never Contacted**
 - Search on prospects/guests added by an admin or through the member portal that haven't been contacted yet and easily follow up
 - Can also query on last contact date if they haven't been contacted in awhile
 - Ability to send mass email from results list
 - Update contact history right from this screen


Never Contacted



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ACTIONS	<u>Prospect Name</u>	<u>Company</u>	<u>Sales Rep</u> ?	<u>Last Contact Date</u>	<u>Referred By</u>	<u>Current Sales Stage</u> ?	<u>Expected Close Date</u>	<u>Has Toured</u>	<u>Primary Goal</u>	<u>Contact Priority</u>	<u>Email</u>	<u>Phone Numbers</u>
Contact History Details	basic-internet							False		High	basic@internet.com	W: 5556669999
Contact History Details	brennen-shelby		best-pete		Member		03/10/2017	False		High	brennen.amef@imail.org	H: 5469988777
Contact History Details	Cadel-Suraj		Sales-Sammy		Member		03/15/2017	False		High	cadewl@training.com	H: 123-456-3355 C: 8687889948

Sales CRM Reports

- **Reports >> Sales CRM >> Sales Summary Report**
 - With 1 click you can create a PDF to share with your team on overall preparedness and effectiveness
 - Summarizes opportunities, calls, sales appointments, and guest membership sales

Month-to-Date - 4/1/2017 to 4/25/2017 			
Sales Summary			
How did you do yesterday?	0 Sales(Membership & PT)		
Are you ready for today?	0 Appointments		
Are you ready for the week ahead?	0 Appointments(2-7)		
Do you have enough leads?	0 Added this week		
Opportunities Added	Yesterday	Today	Month-to-Date
Leads	0	0	1
Referrals	0	0	0
Walk-Ins	0	0	0
Totals	0	0	1
Calls	Yesterday	Today	Month-to-Date
Total Calls	0	0	3
Calls to not visited guests	0	0	0
Calls to missed guests	0	0	0
Calls to prospects	0	0	1
Calls to members	0	0	1
Sales Appointments	Yesterday	Today	Month-to-Date
Sales Appts Added	1	0	2
Sales Appts	0	0	0