WebLink International™

Effectively Managing Sales through WebLinkCONNECT

Tools and Processes for your
Sales Department
(even if you are the sales department!)

WebLinkCONNECT helps the entire sales department

Sales Staff:

Managing prospects

Communicating

Following Up

Closing

Retaining

Sales Manager:

Monitoring Progress of Staff

Predicting New Revenue

Identifying Trends

Tracking Commissions

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WebLinkCONNECT for the Sales Staff

Synopsis

- WebLinkCONNECT uses Sales Opportunities, Revenue Items, Contacts, Affiliations, Tasks, and Reports to help you effectively manage your sales department.
- You must be diligent!

WebLinkCONNECT for the Sales Staff

Create Revenue Items for Sales Opportunities

- Located under Admin > Manage Codes > Revenue Codes > Revenue Items
- Specific or Broad? Specific helps speed proposal and agreement language; broad minimizes administrative workload up front

WebLinkCONNECT for the Sales Staff

Enter prospects into WebLinkCONNECT

- Make sure you flag profile as Prospects (General Tab)
- Assign them to yourself (Details Tab)
- Create or assign any relevant affiliations so you can identify them easier (Affiliations Tab). Extra time here is worth it
- The more information you have on them, the better (business categories, number of employees, event history, etc.)

WebLinkCONNECT for the Sales Staff

Create Sales Opportunities

- Located in Contacts Tab
- Be thorough; fill out every field
- Make sure all fields have options (Source, Probability, etc.)
- Set Estimated Close to a realistic date
- Clean up old sales opportunities regularly (Contacts > Select Sales Opportunities)

WebLinkCONNECT for the Sales Staff

Communicating with Prospects

- Use the “All Prospects” Common Data View
- Use affiliations to communicate in bulk
- Communicate regularly with prospects
- Send Fake Invoices (Reports > Profile Reports > Fake Invoice for Prospect)
- Use Referral Reports to entice competitors of members

WebLinkCONNECT for the Sales Staff

Create Sales Proposals and Agreements

- Language comes from Revenue Items
- Customize language by clicking Customize Proposal / Agreement Text and SAVING!
- Report pulls from Custom Reports > Sales_Proposal and Sales_Agreement. Get these customized for you!
- Use WebLinkCONNECT to send/track the fact that you sent a proposal (Note: Specific Contact Types can be handy here)
- Proposals and Agreements will consolidate all open Sales Opportunities into one report

WebLinkCONNECT for the Sales Staff

Tracking your efforts (Follow Up!)

- Create the initial Contact Record (Contact Type codes for Sales department are good)
- Set up Task Codes (Admin > Manage Codes > Task Codes > Task Types)
  - Suggested Task Types:
    - Sales – Prospecting
    - Sales – Follow Up
    - Sales – Agreements
    - Sales – Retention
- Use Tasks for ongoing reminders to keep following up. Finish one task type…move on to the next.
- Diligence with Tasks means nobody falls through the cracks!

WebLinkCONNECT for the Sales Manager

Monitoring Staff Progress

- Use reports to see your top producers:
  - Sales by User (Reports > Revenue Reports > Sales by user) Pulls from Sold By field on invoice line item
  - Sales Opportunities Created (Reports > Sales Opportunities > Sales Opportunities Created)
  - Sales Funnel by Individual
  - Open Sales Prospects (Reports > Contact Reports > Sales Prospects)
  - Contacts with Prospects (Reports > Contact Reports > Members – Prospects Contacts)

WebLinkCONNECT for the Sales Manager

Monitoring Staff Progress, cont.

- See all Sales Opportunities by Probability (Contacts > Select Sales Opportunities) Group by Probability
- Prospect Protection (Under Admin > Set Preferences . Application Settings > Sales)
  - Protects sales people from losing prospects
  - Stops Sales Opportunities from being changed or closed by another user
  - Stops Contacts from being changed or removed

WebLinkCONNECT for the Sales Manager

Predicting New Revenue

- Use Projected Sales Opportunity Revenue (Reports > Sales Opportunities > Sales Opportunities – Projected Revenue)
  - Totals Sales Opportunities estimated to close in next 180 days
  - Categorizes by Probability

WebLinkCONNECT for the Sales Manager

Identifying Trends

- Lost Sales
  - Use Sales Opportunity Selector to Group by Lost Reason codes. Make sure you have adequate Lost Reason Codes.
- Dropped Members
  - Use Dropped Member Report to identify why members leave (Reports > Member Reports > Member Dropped) Make sure you have adequate Drop codes (Member Activity Codes)
- Two-Year Comparisons
  - Use Two-Year Comparisons to gauge progress (Reports > Revenue Reports > Two Year Comparison of Revenue Invoiced

WebLinkCONNECT for the Sales Manager

Tracking Commissions

- Commission percentages or flat amounts tracked in Invoice Line Items
- Reporting done on Sales by User report (Reports > Revenue Reports > Sales by user)

Appendix Information

Administrative Tasks to Complete

- Set up Revenue Items so you have something to sell
- Create Affiliation codes for the sales staff to manage their own lists
- Create Sales Opportunity Source codes to see what's effective
- Create sales-based Task Type codes to track your time
- Turn on Prospect Protection (optional)
- Create specific Member Activity Drop Codes

Appendix Information

Reports used in this presentation:

- Sales Proposals
  Custom Reports > Sales_Proposal
- Sales Agreements
  Custom Reports > Sales_Proposal
- Fake Invoices
  (Reports > Profile Reports > Fake Invoice for Prospect)

Appendix Information

Reports used in this presentation, cont.

- Sales by User
  (Reports > Revenue Reports > Sales by user) Pulls from Sold By field on invoice line item
- Sales Opportunities Created
  (Reports > Sales Opportunities > Sales Opportunities Created)
- Open Sales Prospects
  (Reports > Contact Reports > Sales Prospects)
- Contacts with Prospects
  (Reports > Contact Reports > Members – Prospects Contacts)

Appendix Information

Reports used in this presentation, cont.

- Projected Sales Opportunity Revenue
  (Reports > Sales Opportunities > Sales Opportunities – Projected Revenue)
- Dropped Members
  (Reports > Member Reports > Member Dropped) Make sure you have adequate Drop codes (Member Activity Codes)
- Two-Year Comparisons
  (Reports > Revenue Reports > Two Year Comparison of Revenue Invoiced)
- **If it's not in here, have it made!!!!**

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Thank You

Please feel free to contact me if you have questions:

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