



THE CASE FOR AN EFFECTIVE CUSTOMER ENGAGEMENT SYSTEM

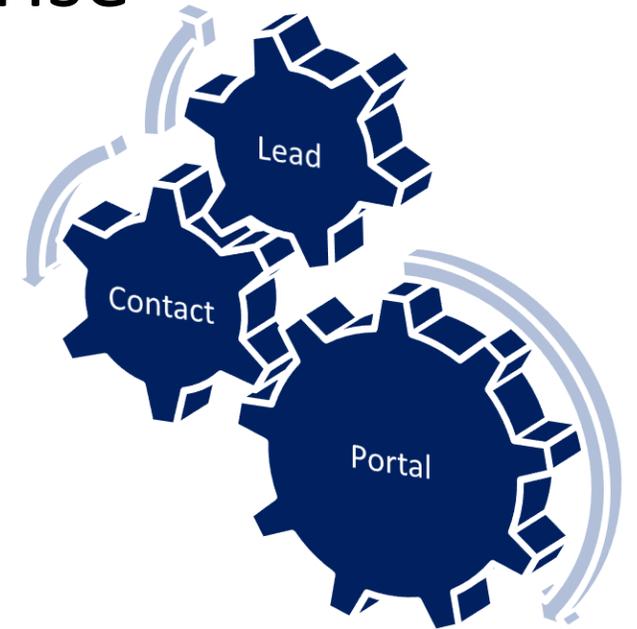
Distributor Lead System

InfoGrow

- Receive little or no feedback on leads shared with distributors
- Difficult to determine ROI from tradeshows and other marketing campaigns
- Our account managers require more knowledge of leads shared
- Difficult to learn from distributors what leads turn into a sales opportunity
- Lead management should be a factor in relationship evaluation reviews but have minimal insight

Dynamics 365 Sales Professional or Enterprise

- Marketing managing the process
- Account Manager's assigning and monitoring a lead to a distributor account rep.
- Distributor Account Representative updating lead status
- Marketing / Account Manager / Sales Manager
Aware with Dashboards for Closing Lead Follow-up Loop





Loyalty



NEEDS

Trust



CARE



CUSTOMER SERVICE

SERVICE

24/7

Satisfaction

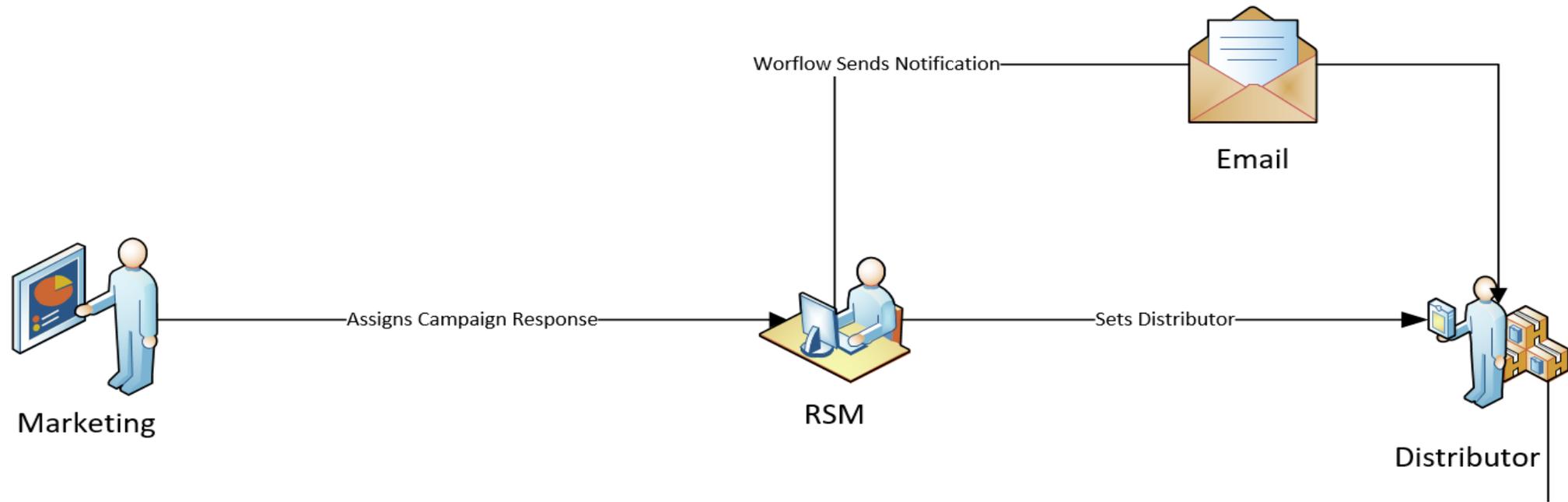
Reward

Quality

OUR PROCESS



INTERNAL PROCESS



Import Process

- Import Lead
- Create Campaign Response from Lead
- Assign to Account Manager

Review Process

- Open Lead
- Navigate to “Details”

TL TestFirst LastName
Lead · Lead

Summary Details Files Related

Description	---
Industry	---
Annual Revenue	---
No. of Employees	---
SIC Code	---
SIC Desc	---
Currency	USD
Lead Type	---
IIR Plant ID	---
Opt In	---

MARKETING INFORMATION

Marketing Materials **Send**

Last Campaign Date ---

Survey Status	First Notice Sent
Outcome	Close, this is not a potential customer
Survey Assigned Date	5/6/2020
Survey Completed Date	4/28/2020
Comments	Test is not a real person
Representative	Duane McKinney

ACCOUNT MANAGER STEPS

- Open a “Campaign Response” in Dynamics
- Assign a “Representative”

Representative Assignment

Representative

- Set “Response Code” to “Sent to Representative”

Response Code * Sent to Representative

- Save the “Campaign Response”
- Close the “Campaign Response”

Close Campaign Resp...

Close Campaign Response

×

Do you want to close the selected 1 Campaign Response?
Select the status of the closing Campaign Response.

State
Closed

Close

Cancel

Email Example

Dear distributor

You have received a new Lead from [redacted]
Please visit [https://resale\[redacted\]powerappsportals.com/](https://resale[redacted]powerappsportals.com/) to fill out the response survey regarding the following Lead:

Company

TestFirst LastName

[dmckinley@\[redacted\]](mailto:dmckinley@[redacted])
[redacted]

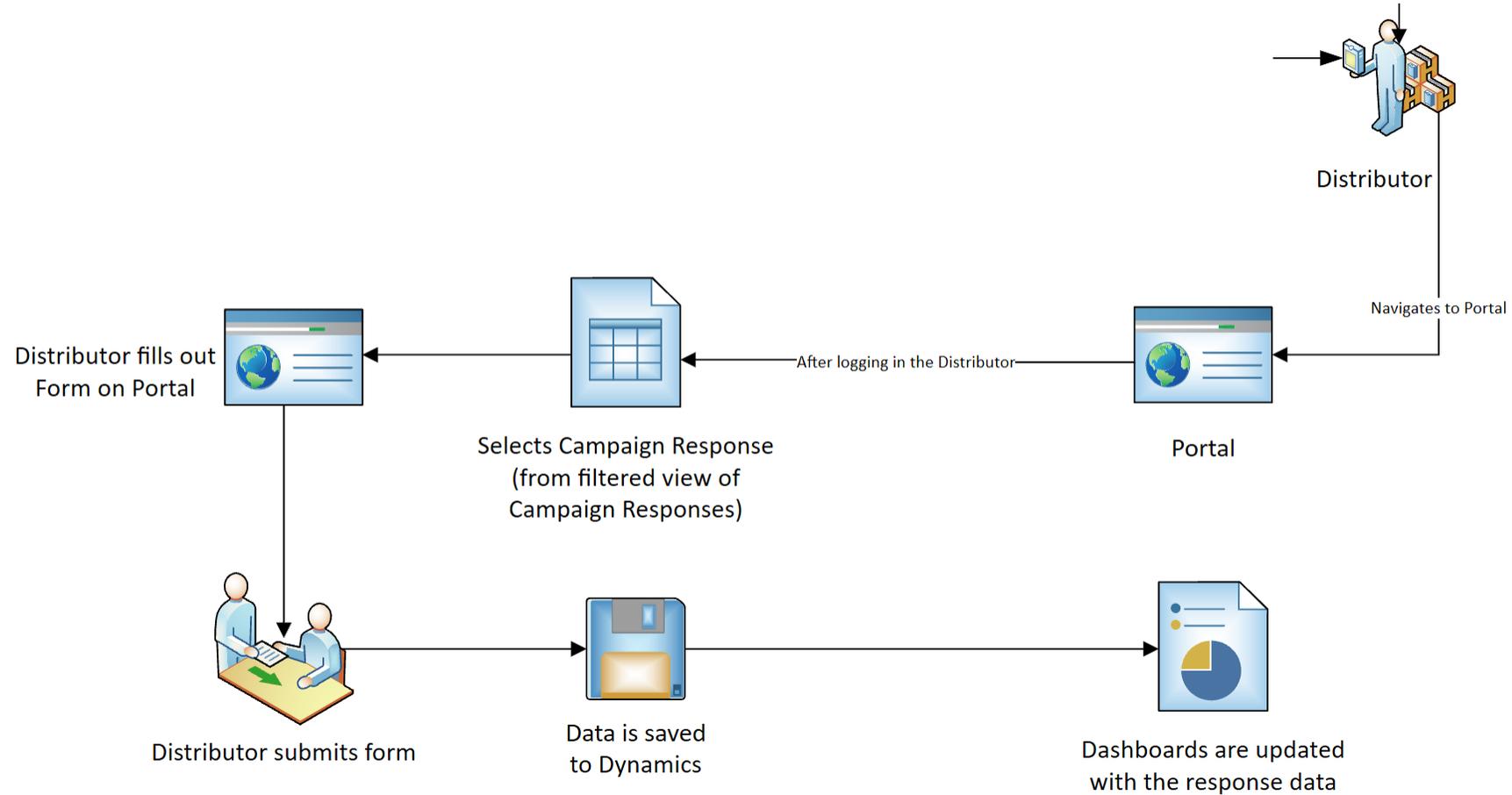
We look forward to your response.

Thank you.

If you want to unsubscribe from these emails, please use this [form](#).

- Email notifications are sent weekly for 5 weeks.
- If the Distributor Contact doesn't respond in that time the Account Manager is notified.

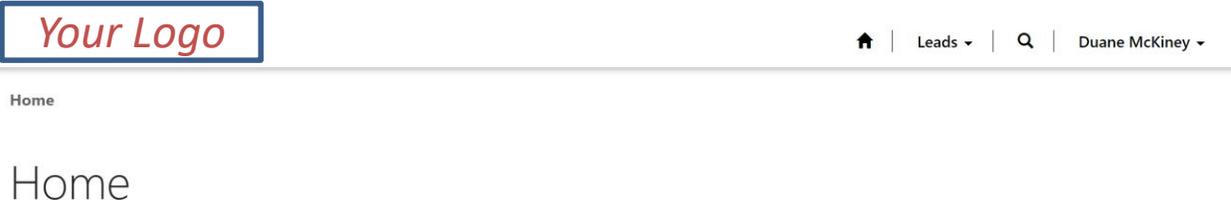
DISTRIBUTOR FOLLOW-UP PROCESS



DISTRIBUTOR – NAVIGATING THE PORTAL

Navigation part 1

- Click the blue hyperlink on the home page
- Sign in using the local sign in form



[Representatives Click Here for Lead Follow up](#)



Your Logo

Sign in with a local account

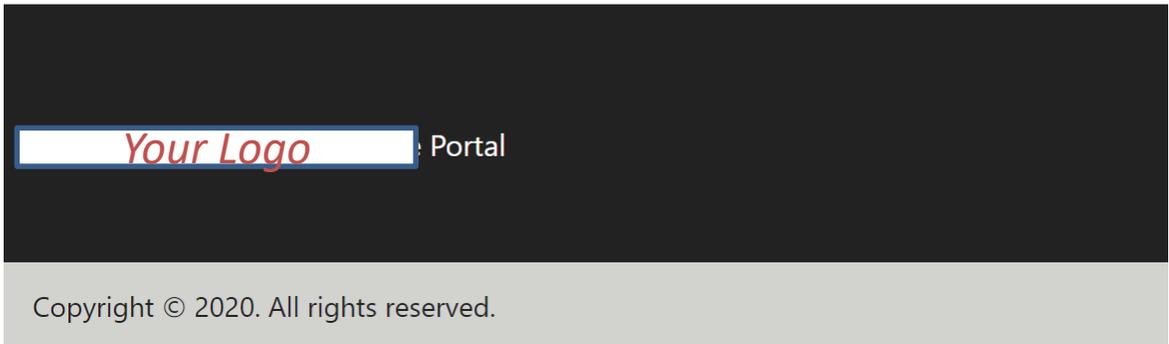
* Username

* Password

Remember me?

Sign in

Forgot your password?



Navigating the Portal

Navigation part 2

- Use the down arrow to select edit on the desired record
- Submit form

Open Leads

Edit ✕

Topic *
Test Topic

Company Name
Company

Name
[Redacted]

Email
dmckinley@[Redacted]

Business Phone
[Redacted]

Please select the outcome and provide any comment below

Outcome
Close, this is not a potential customer

Comments
Test is not a real person

Submit

Search

Topic ↑	Company Name	Full Name	Survey Assigned Date	Survey Status
Test Topic	Company	TestFirst LastName	5/6/2020	First Notice Sent <input type="button" value="▼"/>



InfoGrow

Thank You for Your Time!

■ **Contact**

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