

Raising the Bar for Business in New Mexico

ABQ LEAP

League of Enterprise Accredited Professionals

IDSP Business Academy

Enterprise Mastery

18-Week Program

- Sales/CRM

For the XpanZion
Enterprise Platform

Worksheet 3 of 18

The screenshot shows the IDSP Business Academy website. At the top, there is a navigation bar with links: Home, Library, Membership, Reviews, Events, Blog, Contact Us, Forum, Links, Courses, My Cart, and Bob the Builder. Below the navigation bar, there is a 'Questions?' section with a form to contact the academy. The form includes fields for 'Your Name', 'Phone Number', 'Email', 'Your Company', 'Subject', and 'Your Question'. A 'Send' button is at the bottom of the form. To the right of the form is a map of Albuquerque, New Mexico, with the academy's address: 9301 Central Ave NE, Albuquerque, NM 87109. A pull-down menu is open, showing options: Website, Discuss, Calendar, Contacts, Sales, Lead Automation, Purchases, Inventory, Accounting, Mass Mailing, Events, Surveys, Website, Website Admin, Apps, and Settings.

- 1) Fill out the form on Contact Page
 - 2) Select Website from the upper left & Sales in the pull-down menu
 - 3) Select Leads from the left menu
 - 4) Select the new record
- Note: If you do not see your lead, contact the Space-Port-Pros for assistance
- 5) Click Convert to Opportunity
 - 6) Select your options in popup box
 - 7) Click Create Opportunity – this will add the lead to your Contacts and put them in the beginning of your sales pipeline
 - 8) Select Your Pipeline from the left menu
 - 9) Try clicking and dragging the new card to another column
 - 10) You can set the priority by selecting the star of choice
 - 11) Use the opportunity menu on the card to change colors
 - 12) Select the gear icon at the Top of the column to edit the column and change the name
 - 13) Select Add Column on the far right to add a sales process stage
 - 14) Drag the column to the correct position

The screenshot shows the IDSP Business Academy software interface. At the top, there is a navigation bar with links: Discuss, Calendar, and Contacts. Below the navigation bar, there is a sidebar with a list of menu items: Dashboard, Sales, Leads, Customers, Your Pipeline, Next Activities, Quotations, Sales Orders, Products, Product Variants, and Invoicing. The main area shows a sales pipeline with columns for 'New', 'Testing Contact Form', and 'Proposit'. A context menu is open over the 'Testing Contact Form' column, showing options: Fold, Edit, Delete, Archive Records, and Unarchive Records.

Contact Resource Management is vital to an effective sales process.

Track your leads and progress them through your sales process.

Define the stages of your sales process and customize your pipeline.

Color code your opportunities for easy categorization.

Select a priority star rating to keep the highest priority opportunities on top of your sales stages.

Use the opportunity card to keep notes, schedule meetings. This will assist in using Next Activities to know who to contact next.