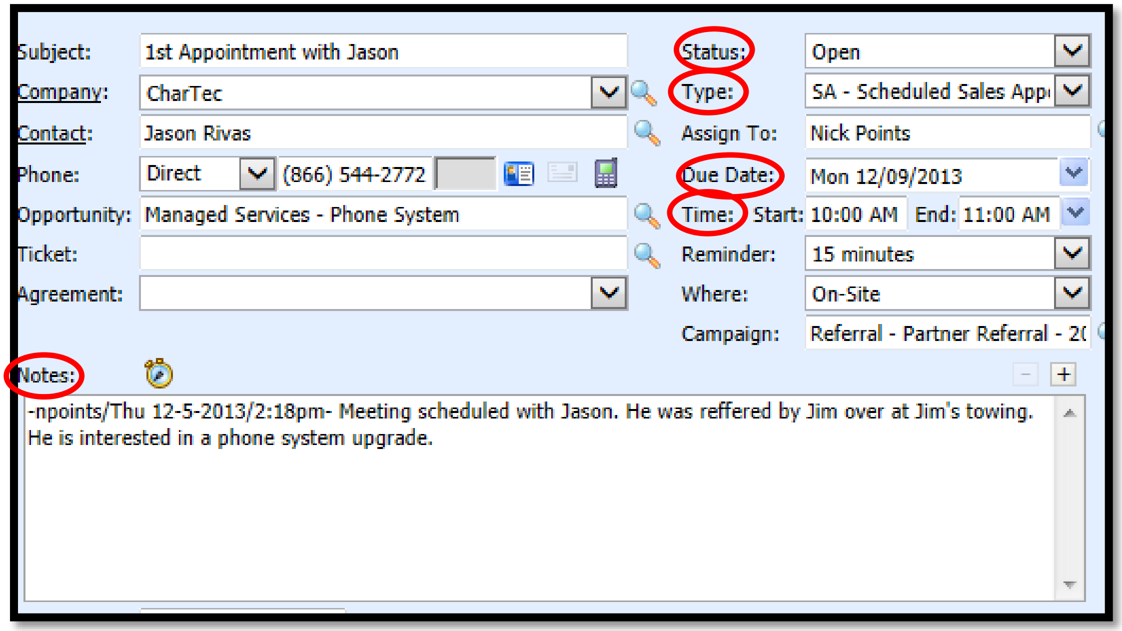
CharTec's
Customer Relationship Management
Best Practices

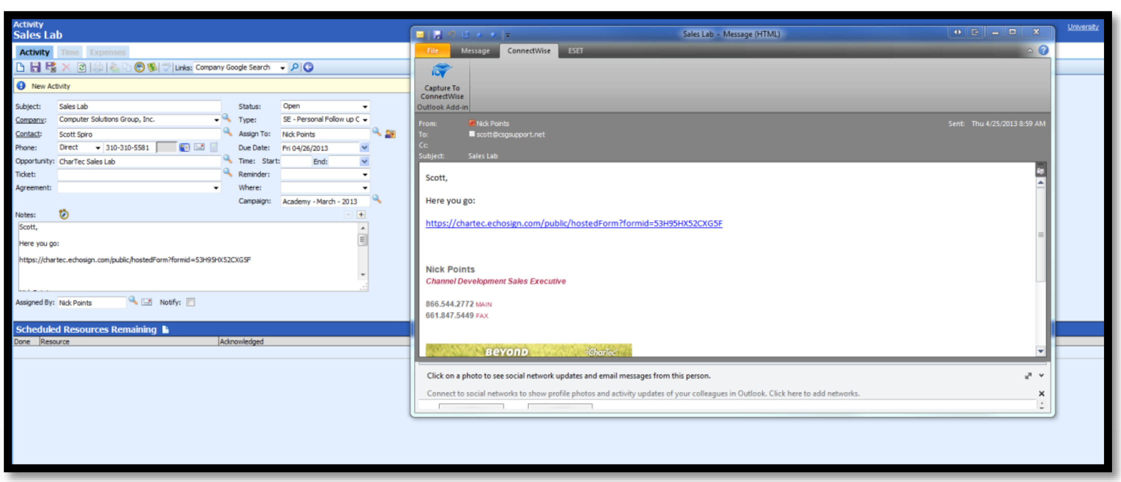
Activities & Points

Creating clear activities will allow you to track what your sales people are doing to move a sale through the funnel. Each Opportunity should have a next step activity associated. We also recommend setting point values for each of your activities and measuring these points against a sales quota. You can use these points to track for bonuses and/or commissions, incentivize sales staff to meet quota, and have accountability. The following are examples of Activities and Point Values we utilize for ARRC and CharTec.

Activity



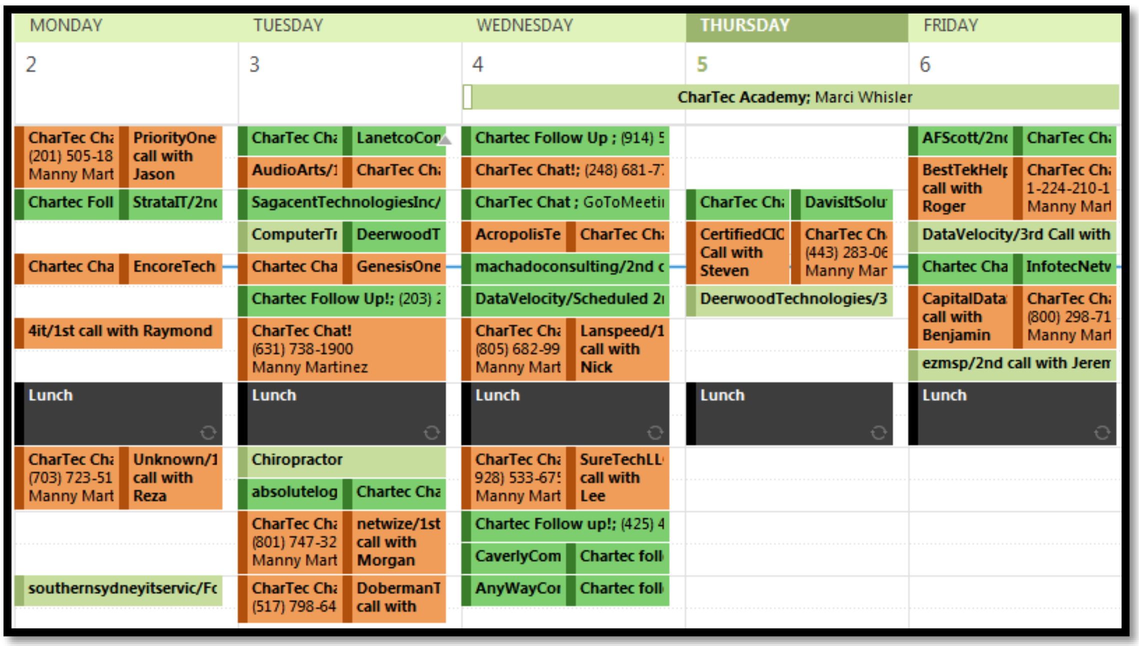
Activity Capture



Activity Scheduling

Because all Opportunities in ConnectWise should have a next associated with it, it is best practice to schedule out this next step on the calendar with the appropriate time allocated for completion. If next step activities are not scheduled with allocated time, the chances of this activity being pushed out or not completed drastically increases thus delaying the sales cycle – or even worse, stopping it in its tracks.

Below is a sample calendar set with scheduled activities:



Sales Activity Points

Sales Activity Points are a way to track the sales efforts of a Sales Professional aside from revenue quota attainment. Sales Activity points are designed to keep the sales process moving forward in the sales funnel by completing all of the activities that ultimately lead to more sales.

Below is the Activity Points structure we use:

Activity Points Description			
Activities for Points	**Point Value**	**Reccomended # of Activities to be completed monthly (Quota)**	**Total Points**
Add Prospect to Funnel	**3**	**20**	60
1st Appointment	10	7	70
Discovery Meeting	12	4	48
Presentation Appointment	14	4	56
Follow Up Appointment to Close	16	0	0
Proactive Date With Client	5	0	0
Follow up Call/Email	1	0	0
Thank You Postcard after a meeting	1	0	0
2 Hr Cold Call Block	15	4	60
Marketing Track Activity Call	1	0	0
Lead Follow Up Call	1	0	0
Attend a Social Event/Trade Show	10	2	20
Host a Webinar or Lunch & Learn	10	1	10
Lunch Date w/ Client	5	2	10
Value Add Proacitve Email	2	10	20
Technology Business Review Meeting	20	4	80
Referral Given to a Client	5	1	5
New Hardware Quote	5	15	75
New Addendum Quote	10	10	100
Thank You Card	1	10	10
Approved Wow Experience	10	2	20
		TOTAL	**644**

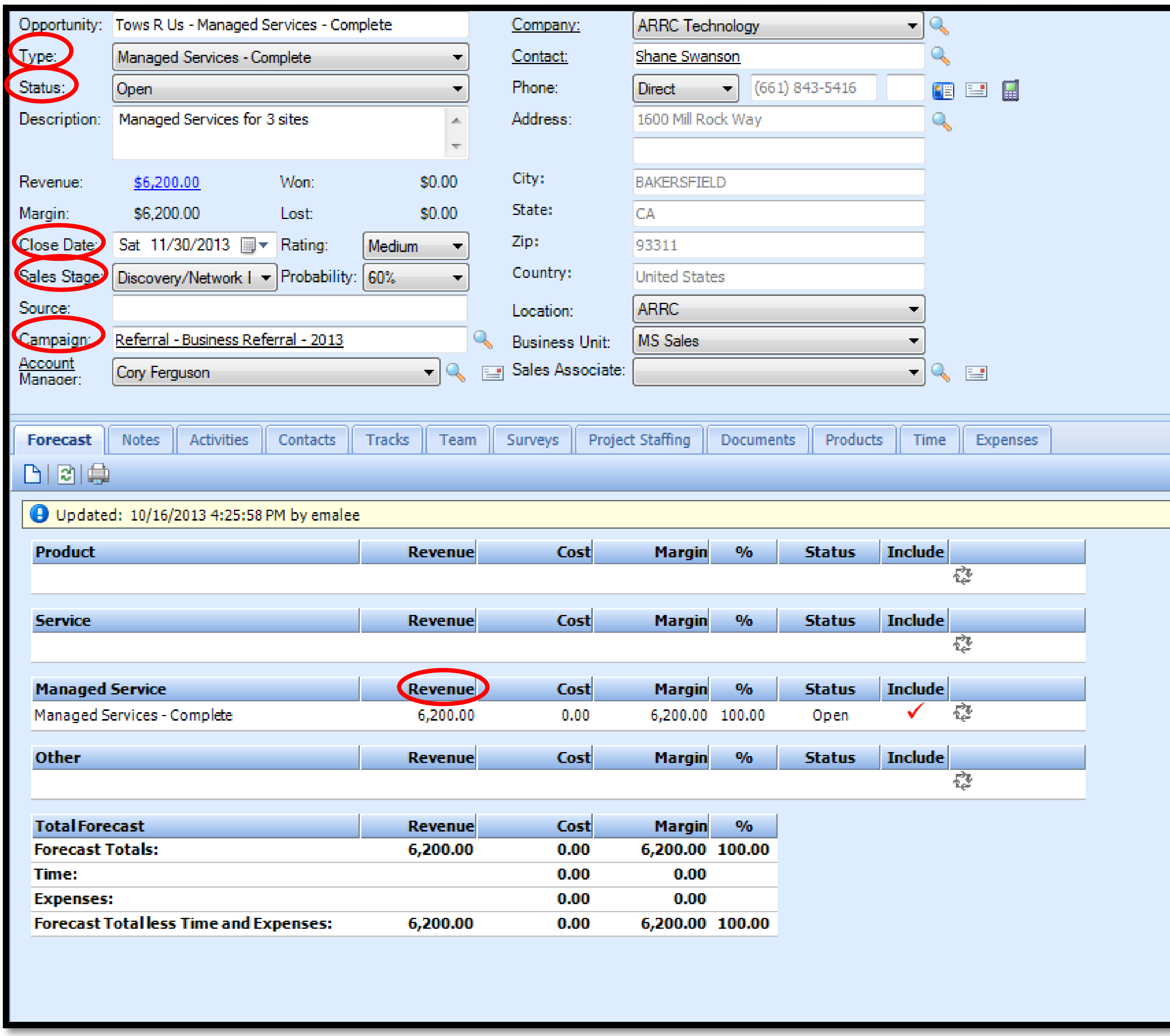
KEY
Sales Funnel Stages
Activites to Farm Current Opportunities
Pro Active Activities to add to the funnel
General Farming Activites For Current Clients

Sales Professional Quota – 500pts

Opportunities

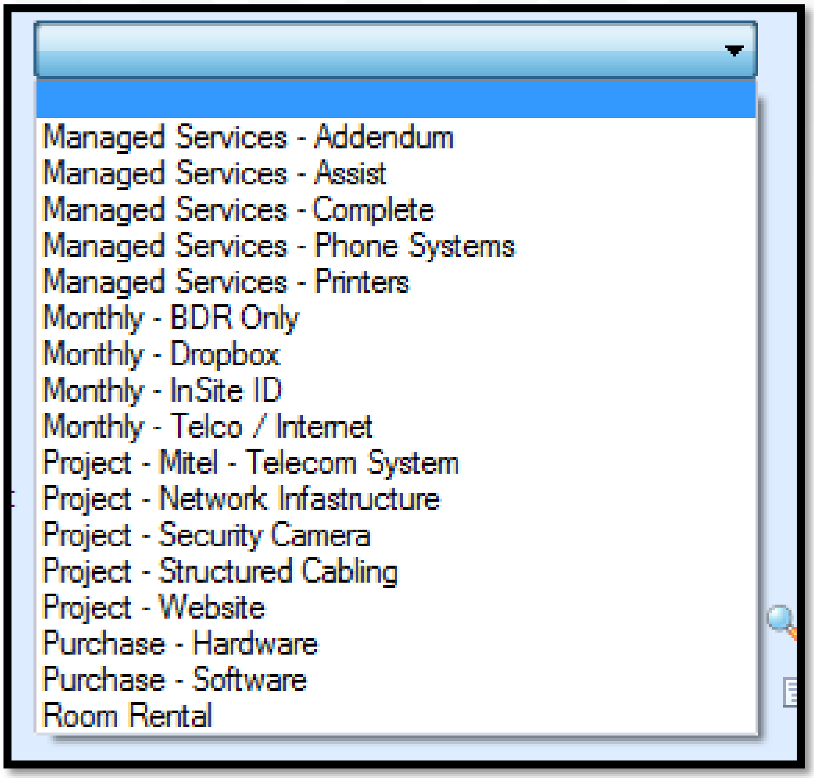
Opportunities in ConnectWise provide the basis for all possible sales functionality. Any level of interest, no matter how slight, should become an opportunity. Capturing a significant number of these will fill the top of your sales funnel and you can then use Tracks and Activities to drive them through the sales process.

Opportunities are driven by Campaigns, which are classified by Type and Status. See below for an example of an opportunity:



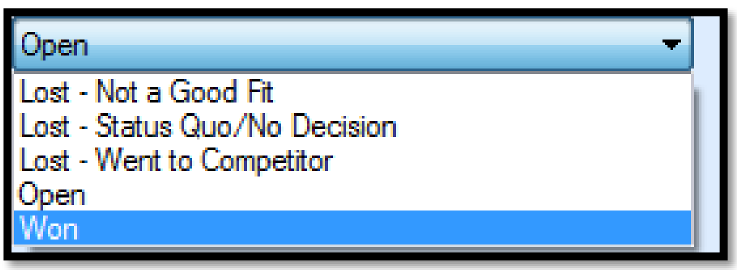
Opportunity Types

Opportunity types need to match all of the potential products or services you may offer. Anything that the salesperson could sell as a standalone product should be listed as an opportunity type. This makes it easier for reporting.



Opportunity Status

In this case, less is more. Minimize the number of opportunity statuses to add clarity and make it more efficient for the salesperson. To get more granular on the specifics, use the Description field.



Sales Dashboard

The Sales Dashboard displays a Member's progress towards their Sales Forecast for the month/quarter/year. This is a great tool for forecasting sales and managing your sales team.

Quarterly Summary By Member

Member	October			November			December		
	Total	Quota	%	Total	Quota	%	Total	Quota	%
Cory Ferguson	2,895	4,000	72 %	0	4,000	0 %	0	4,000	0 %
Monthly Totals	**2,895**	**4,000**	**72 %**	**0**	**4,000**	**0 %**	**0**	**4,000**	**0 %**
YTD Totals	**48,861**	**40,000**	**122 %**	**48,861**	**44,000**	**111 %**	**48,861**	**48,000**	**102 %**

Quarterly Summary By Location

Location/Business Unit	Oct	Nov	Dec	Total
ARRC	**2,895**	**0**	**0**	**2,895**
MS Sales	2,895	0	0	2,895
Totals	**2,895**	**0**	**0**	**2,895**

Sales Funnel

Stage 1 – Prospect: This is a lead we've received at an event, networking, from a front counter visit, etc. This prospect is placed on a General Interest Track, but at this point nothing has been scheduled in terms of visiting their site. We continue to market to and pique interest enough to generate a call, web submission, etc. to schedule a first appointment.

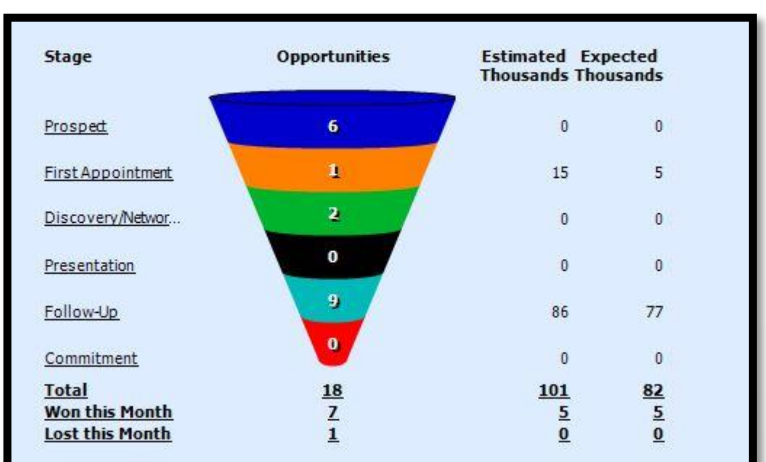
Stage 2 – 1st Appointment: We have visited their site and qualified the opportunity further. We built enough credibility with the individual(s) we spoke with to have scheduled our Sales and Network Discovery.

Stage 3 – Discovery: We have met with all of the employees and officers of the company to gather facts and identify buying reasons to use during the sales presentation - adding value to the services we provide. At this time we will also conduct the network assessment identifying all of the challenges this prospect is facing with their network infrastructure. *Note: these should be treated as two separate discoveries from the standpoint of the questions that are asked – even if you are the same person doing the sales and network discovery.*

Stage 4 – Presentation: After conducting the Discovery, the Sales Associate will put together a proposal and schedule a presentation with the decision makers at the company. This stage covers all the way through preparation to presentation (see sales process on the CharTec ConnectSite for details).

Stage 5 – Follow-Up: If after we've presented the proposal, we did not receive an immediate decision from the prospect, we place them in this stage. At this point, we plan for follow-up, and/or place them on the appropriate sales track. If the prospect makes a commitment, skip this stage and proceed directly to step 6. An opportunity is not marked Lost until the prospect directly says "no". If the client does say "no," mark the opportunity as lost and explain why in the notes section of their profile.

Stage 6 – Commitment: The prospect has made the decision to move forward and has signed the agreement. Both Projects (i.e. cabling) and Managed Service Agreements remain in this stage until every piece of the Project or Agreement set-up is completed. After this point it is moved into invoicing and marked as won. It is important to update the notes pages throughout this entire process.



Stage	Opportunities	Estimated Thousands	Expected Thousands
Prospect	6	0	0
First Appointment	1	15	5
Discovery/Networ...	2	0	0
Presentation	0	0	0
Follow-Up	9	86	77
Commitment	0	0	0
Total	18	101	82
Won this Month	7	5	5
Lost this Month	1	0	0

Campaigns

Campaigns allow you to track the ROI on campaigns we conduct, track gross profit, view all opportunities, and activities tied to the campaign, and conduct opportunity analysis. You can also track emails opened, links clicked, and forms completed and submitted using ConnectWise Integration tool produced by **Nex.To.**

ConnectWise Campaign Types and Sub-Types

Setting campaigns types and sub-types is essential to tracking sales opportunities and ROI on events and marketing efforts in ConnectWise because it allows you to define marketing campaigns.

Before you can use customized Campaign Types and Sub-Types, a ConnectWise Administrator will need to configure the Type and Sub-Type tables. These are found under Set-Up Tables→Opportunities→Types and Sub-Types. You can set up as many Types and Sub-Types as you'd like. Note that every campaign Sub-Type must be cross-referenced to a particular Type.

These are the options we have set up for ConnectWise Campaigns Types and Sub-Types for ARRC.

- Direct Mail
  - Letter
  - Postcard
- Email
  - Important Announcement
  - Product Promotion
  - Track – General
  - Track – Vertical
- Event
  - Chamber
  - Lunch & Learn
  - Open House
- Inside Sales
  - Product Promotion
  - Discount
- Pay Per Click (PPC)
  - PPC
- Public Relations
  - Press Release
  - Pitch
- Print
  - Magazine
  - Newspaper
- Referral
  - Business Referral
- Sales Executive
  - Cold Call
- Social Media
  - Facebook
  - LinkedIn
- Telemarketing
  - MSP Leads
- Walk-In
- Webinar
- Website
  - Visitor ID
  - Website

Tracks

Tracks are the easiest way to automate your marketing efforts, including activities and emails as you drive individuals through the sales funnel.

ARRC primarily utilized five Track types:

General Interest: This is a year-long track that all prospects are placed on as soon as we meet them, unless there is a specific event track attached. These prospects could include individuals met networking, at Chamber mixers, charitable events, etc.

Industry Specific Tracks: ARRC has identified four major target industries and has developed a track with dedicated content aimed towards those industries. After a prospect completes and Industry Specific Track, they'll be added to the General Interest Track.

Value-Add Track: This is for current clients who may not be utilizing all of our services, yet are experiencing significant growth or change. Our Sales Executive will decide when/if to place current clients on this track deemed on up-sale potential.

Event Specific: For large events only, we will develop an Event Specific track consisting of 4-5 touches initiated immediately following the event. Following the completion of this track, the prospect is placed on the General Interest track.

Lost Sale Track: This track should be used if a prospect chooses to go with another company, or if the sales goes stagnant and the prospect is just not making a decision, indicating that they may be choosing to go with the status quo. It is a yearlong track intended initially to place wedges and raise questions about going with another company or sticking with the status quo. Then, it switches focus to reminding them about your company so that you remain top of mind at all times.