BlueCamroo

User Guide v. 4.0

Do More with BlueCamroo

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This Guide is Version: **4.0.1**

Release Date: **June 7th, 2012**

4. Managing the Sales Cycle

4.1 Handling Sales Leads

BlueCamroo supports the entire Sales Cycle, from first discovering a potential Lead, through Lead qualification; identifying and tracking specific Sales Opportunities; producing Sales Quotations, and ultimately progressing successful sales into Projects.

In BlueCamroo, Leads might be:

- People who fill in your web-forms
- People you meet at networking meetings
- People who email inquiries
- People you spot on Twitter or Facebook asking about services that you provide
- Tips and recommendations from existing clients
- Telemarketing Lists that you buy or rent.

What all of these people have in common is: *you don't know very much about them!* You're going to have to research them; email them; call them. In short: find out who they are, and whether they have any potential interest in doing business with you. You're going to ***qualify*** your Leads.

But what about an existing customer, who's already bought from you three or four times, and who you know has a big new purchase requirement coming up? Isn't he a Lead? Well, of course some sales organizations would describe that as a 'sales lead', but in BlueCamroo that is an **Opportunity**. Here's the distinction:

A Lead:	***An Opportunity:***
A person or organization you have become aware of. May be valuable or not. Needs to be QUALIFIED.	A specific potential purchase requirement for your products or services.

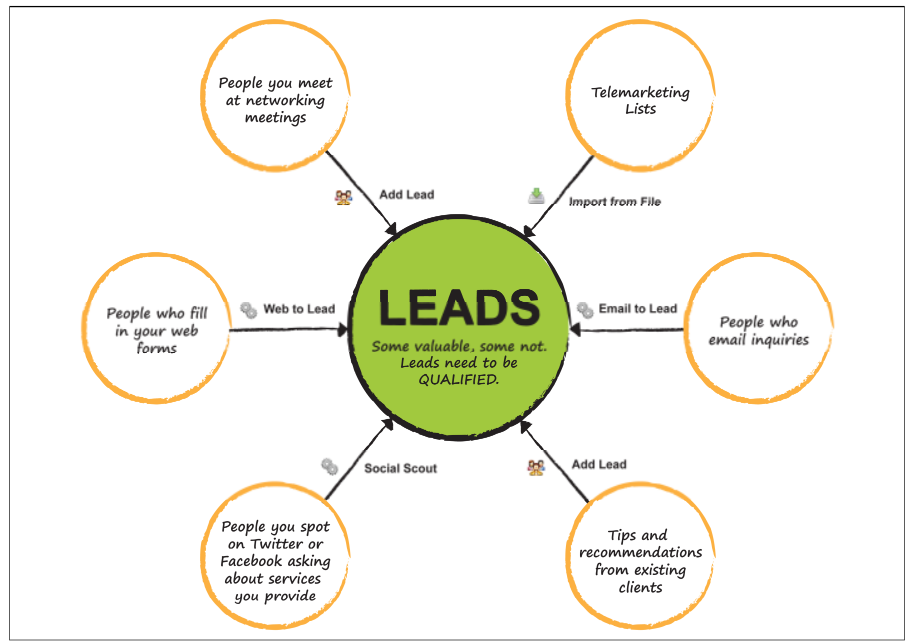
Of course, a **Lead** may have one or more specific **Opportunities** that you wish to track, just the same as an existing customer.

4.1.1 Capturing Leads

To work with your Leads, you'll need to get their details into BlueCamroo. If you're dealing with one-off Leads, such as the person whose business card you picked up at a networking breakfast, or the recommendation from an existing client, you'll be entering their details manually at your keyboard.

Simply drop-down the Quick Action button from the Toolbar and pick **Add Lead**.

Often, however, BlueCamroo can provide automated processes to capture Leads:



Web To Lead Forms

BlueCamroo lets you easily build Web To Lead Forms that you can add to your website, blog, etc. When a visitor to your website completes the form, a new Lead will be created in BlueCamroo, with all their information. (For Web to Lead setup, go to **Setup | Automation | Web-to-Lead**.)

Email To Lead

Often, the first contact you have with a Lead is when they have come across details of your business, and have sent an email to your general contact email address, such as "sales@mycompany.com", or "info@mycompany.com".

BlueCamroo allows you to configure special **Email To Lead** email addresses which, when an email is received, can process it automatically to generate a new Lead. For example, if your business defines "sales@mycompany.bluecamroo.com" as an Email To Lead address, then every email received at that address from a completely new contact to your organization will automatically create a new Lead.

Email to Lead – All the facts!

The Email to Lead process is actually even more powerful than this. Here's what it does with each new email it receives:

1. Check if the 'from' email address is already in the system. If not, create a new Lead, and attach the email to it.
2. If the email already exists as a Lead, attach the new email to the existing Lead.
3. If the email already exists as a **Contact** at an existing **Organization**, attach the new email to the existing Contact.
4. If the email does not exist in the system, but the domain is recognized as belonging to a Contact on an existing Organization – e.g. an email is received from "john**@mycompany.com**", who is not know in the system, but there *is* a "david**@mycompany.com**" – then a new Contact will be created for the same Organization, and the email attached to it.

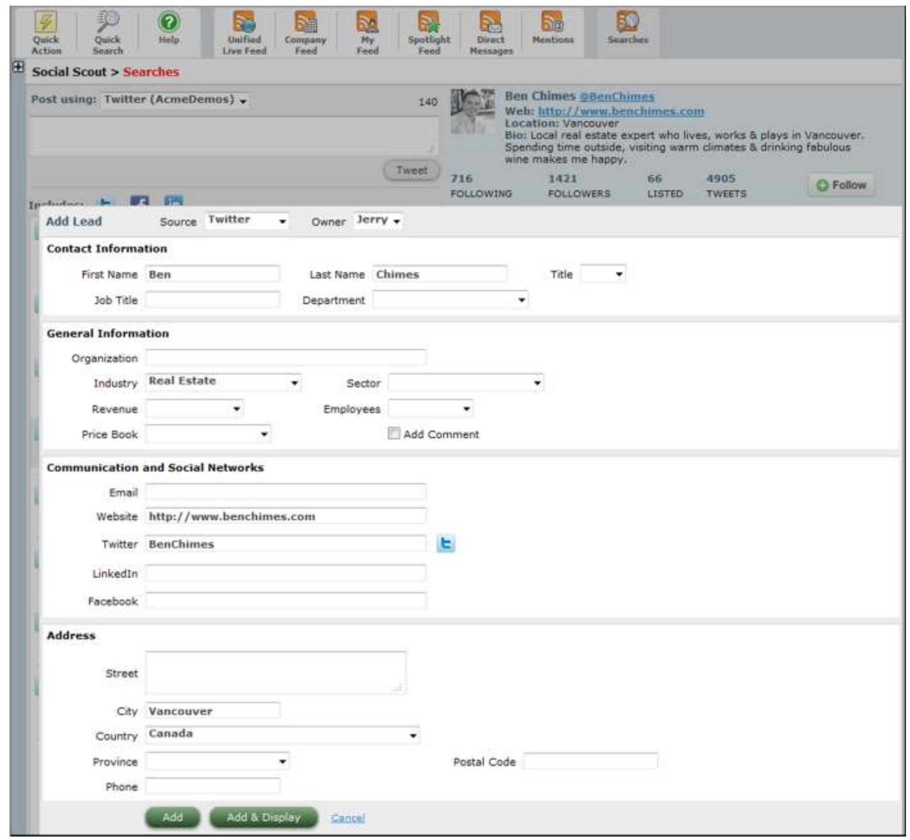
The default **Email to Lead** address is 'sales@[yourdomain].bluecamroo.com'. You can configure additional addresses at **Setup | Automation | Lead Creation by Email.**

Tip: You can forward any email you have received to your valid Email To Lead address(es) to add it to BlueCamroo as a Lead, but it is even better if you can redirect selected addresses on your company email system so they point directly to BlueCamroo. For example, you might point "info@mycompany.com" to "info@mycompany.bluecamroo.com". (Talk to whomever controls your email system if you need help setting this up.)

Social Scout

Social Scout (see Section 5) is BlueCamroo's Social Network Monitoring module, built right in to your BlueCamroo system. Amongst other features, the Social Scout enables you to define Searches that can be a great source of new Leads.

When you identify a Lead within the Social Scout that you feel may be worth following up on, you can click to add it directly to your BlueCamroo Leads.

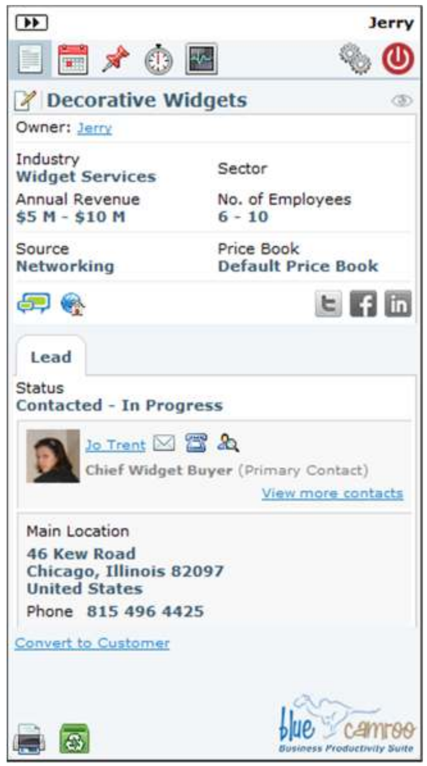


Import from File

If you have Lead data in other systems, or in data files that you have purchased, you can import the information directly into BlueCamroo. Full details of how to import data is provided in Appendix 2.

Note: Only System Administrators have access to the Import feature.

4.1.2 Qualifying Leads



As mentioned above, Leads are details of people and organizations that you don't know a great deal about. A Lead may be a potential customer, or it may just be a random connection that's really not right for your business. That's why the first action you, or your sales team, need to take is to ***Qualify*** each Sales Lead.

How you Qualify your Leads is up to you. In some businesses, it can mean picking up the phone and arranging a meeting; in others it might involve desk research to 'score' the Lead. Whatever method you use to Qualify your Leads, BlueCamroo enables you to keep and share a record of all the Calls you make and receive; Tasks; Meetings; and the Emails and Documents related to the Lead.

From your sales follow-up, you will eventually decide that some leads ***Qualify-In*** and progress as prospective or actual Customers (see below); others will ***Qualify-Out*** and be set aside.

4.1.3 Converting Leads into Customers

To Convert a Lead, simply click the **Convert to Customer** link from the right hand panel.

All the Lead History that you have built up is retained and attached to the Organization when you Convert your Lead.

Tip: Some BlueCamroo users like to convert Leads to Customer status only when they receive their first order; others like to convert Leads to a 'Prospective Customer' after the Lead is qualified. Neither way is better than the other: you can do everything with a Lead that you can do with a Customer, other than associating Projects and raising Invoices.

4.2 Working with Customers

In BlueCamroo, a 'Customer' can be any Organization or Person (i.e. individual consumer) with whom you have a 'selling-to' kind of relationship. You can define as many different types of Customer as you choose, so if you want to distinguish 'Key Accounts' from other customers, for example, you (or your System Administrator) can go ahead and do that. Your list of Customer Types is managed in setup: **Setup | Lookup Values | Customer Types.**

If a particular Customer is an **Organization**, the People who work at that Organization can be connected to it as **Contacts**. Remember, however, that in this case it is the Organization that is the Customer, not the Person. A Person is only a Customer if they are buying from you in their own right.

4.3 Managing Sales Opportunities

A few pages back, we drew attention to the difference between Leads and Opportunities. To recap: a **Lead** is a person / organization that may or may not have some need for your products or services, and needs to be qualified to determine whether you want to invest more sales effort in developing the relationship; an **Opportunity** is a specific piece of potential business with a Lead or existing Customer, usually with an estimated value and time horizon to close.

4.3.1 Creating Opportunities

To add an Opportunity to BlueCamroo, drop down the Quick Action button and select **Add Opportunity**.

Be sure when you add the Opportunity to input your best estimate of the value of the potential Sale, and also the date by which you expect the Opportunity to be closed (i.e. the sale to be made).

4.3.2 Adding Information about a Sales Opportunity

Just as you do with Leads, Organizations and Contacts, BlueCamroo allows you to attach Emails, Tasks, Files, etc to your Opportunity. However, on the Toolbar in any Opportunity you'll find a number of additional types of data that you can add:

<u>Settings</u>

The Settings button contains three options:

<u>Contact Roles</u>

For larger sales opportunities, there are frequently multiple decision-makers within the client organization. Contact Roles allow you to build up a picture of who is involved in the sale from the client perspective, and what role they play.

<u>Team Members</u>

Who from your team will be involved in delivering your product or service?

<u>Shares</u>

If your workspace is set up to manage permissions at the individual opportunity level (rather than one setting for all opportunities), this lets you control who has access to the opportunity. (See Appendix 1 – Managing Users and Permissions for further explanation of Shares.)

<u>Products and Sales Quotes</u>

What **Products and Services** make up the Sale that you are proposing? (Note: If you add Products, the estimated Opportunity Value will be updated accordingly.)

As the name suggests, the ***Products and Sales Quotes*** area also includes the facility to send out a Sales Quotation directly from BlueCamroo. This quotation will be sent as an email attachment, and your customer will have the option to accept or provide feedback on the Quotation online.

For further information on setting up and using Sales Quotations, please see Section 11.

4.3.3 Reporting Sales Pipeline

BlueCamroo makes it easy for you to build your own reports on your data (see Section 15). For reporting Sales Pipeline, however, there is a special pre-defined report that you can use.

To access this report, select **Reports** from the left hand Explorer Bar, then **Pre-Defined Reports** and **Sales Opportunity Tracking**.

Pipeline Valuation

Stage	# Opportunities			Opportunity Weighted Value			Opportunity Values		
	Start	Change	End	Start	Change	End	Start	Change	End
Exploration	0	1	1	0.00	300.00	300.00	0.00	3,000.00	3,000.00
Quotation	2	-1	1	4,830.00	-2,280.00	2,550.00	16,100.00	-7,600.00	8,500.00
Total Pipeline Value	**2**	**0**	**2**	**4,830.00**	**-1,980.00**	**2,850.00**	**16,100.00**	**-4,600.00**	**11,500.00**
Won - Estimated Value			1						7,600.00
Won - Actual Value									7,000.00
Other Sales									2,200.00
Total Sales (Actual)									9,200.00

Pipeline Details

Phase	Opportunity Name	Account Name	Phase	Probability	Estimated Close Date	Valued At	Weighted Value
Exploration	Web Design	Daily Bugle	Exploration	10%	31 May 12	3,000.00	300.00
Exploration	Annual Report Design + Print	Evil Petting Zoos Inc	Quotation	30%	15 Jun 12	8,500.00	2,550.00

Export report to pdf

4.4 Completing the Sales Cycle

You've closed the sale. Congratulations!

In BlueCamroo, you manage delivering, billing and receiving payment for your products and services via **Projects**, so go ahead now and ***convert*** your Opportunity into a Project.

Just as when you converted a Lead into a Customer, converting Opportunities into Projects retains all the Opportunity history, so any emails, sales quotations or attachments will move across to the new Project.

See Section 8 to learn about Creating and Managing Projects.

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Business Productivity Suite