CRM-POWERMENT

You'll never reach your full growth potential without an effectively-used CRM. Here are some exercises to get you moving in the right direction.

Go to thegistinbound.com/tpg2022 for more.

THE GIST
INBOUND OUTFITTERS

DEAL PIPELINE - REQUIRED INFORMATION (SAMPLE)

NEW PROSPECT	NEEDS ANALYSIS	DEMO COMPLETE	PROPOSAL SENT	FORECASTED	CLOSED WON	CLOSED LOST
DEAL TYPE	NUMBER OF EMPLOYEES	DATE OF DEMO	AMOUNT ($)	PROJECTED CLOSE DATE	CLOSE DATE	CLOSE DATE
OWNER	PAY FREQUENCIES	DEMO INCLUSIONS	PROJECTED CLOSE DATE	TARGET RUN DATE	CLOSED WON REASON	CLOSED LOST REASON
SOURCE OF BUSINESS	STATES WITH EMPLOYEES	RELEVANT DEMO NOTES	NUMBER OF COMPANIES		LEGAL NAME	WIN BACK POSSIBILITY?
	CURRENT PROVIDER	PRIMARY DECISION MAKER	BUSINESS ENTITY TYPE(S)		DBA	FOLLOW-UP DATE
	PAIN POINTS		CHECK TYPE(S)		EIN	
	SOLUTIONS INTEREST		PRIMARY INPUT METHOD		FIRST TIME EMPLOYER?	
	INDUSTRY				ADDRESS	
					CITY	
					STATE	
					ZIP CODE	
					SALES REP	
					TARGET RUN DATE	

A more comprehensive, digital version of this workbook (plus more resources) can be found at thegistinbound.com/tpg2022

DEAL PIPELINE - REQUIRED INFORMATION (NOW YOU TRY)

DEAL-BASED REPORTS

NEW OPPORTUNITIES
TOTAL DEALS CREATED BY MONTH
DEALS BROKEN DOWN BY SOURCE OF BUSINESS
DEALS CREATED BY SALES REP (DEAL LEADERBOARD)
LIVE STREAM OF MOST RECENT DEALS CREATED

PROSPECT PROFILING
DEALS BROKEN DOWN BY EMPLOYEE COUNT
DEALS BROKEN DOWN BY CURRENT PROVIDERS
DEALS BROKEN DOWN BY PROSPECT'S PAIN POINT(S)
DEALS BROKEN DOWN BY INTERESTED SOLUTIONS
DEALS BROKEN DOWN BY INDUSTRY

DEAL VELOCITY AND SUCCESS
CLOSED WON/LOST RATIO
CLOSED WON/LOST RATIO BY EMPLOYEE COUNT
CLOSED WON/LOST RATIO BY SOURCE OF BUSINESS
CLOSED WON/LOST REASON BY SOLUTIONS INTEREST
CLOSED WON/LOST RATIO WHEN DEMO IS PROVIDED
AVERAGE TIME TO CLOSE DEALS CLOSED WON/LOST

CLOSED DEAL ANALYSIS
DEALS CLOSED + TOTAL REVENUE BY MONTH
DEALS CLOSED + TOTAL REVENUE BY OWNER (LEADERBOARD)
AVERAGE EMPLOYEE COUNT FOR CLOSED WON DEALS
MOST COMMON INDUSTRIES FOR CLOSED WON DEALS
AVERAGE DEAL SIZE

GET SOME QUICK WINS

SALES OPERATIONS
CONFIGURE DEAL PIPELINE
AUTOMATE DATA SYNC TO CONTACT + COMPANY RECORDS
AUTOMATE THE SALES < > IMPLEMENTATION HANDOFF/COMMUNICATION
BUILD BASIC SALES REPORTS (ACTIVITY, DEAL INSIGHTS, ETC.)
AUTOMATICALLY CREATE AND ASSIGN DEALS FROM FORM SUBMISSIONS
REPORT ON IDEAL CLIENT UPSELL CANDIDATES

STREAMLINE OUTREACH
INTEGRATE YOUR INBOX WITH YOUR CRM
USE A CALENDAR/MEETING BOOKING LINK
USE EMAIL TEMPLATES
IMPLEMENT AUTOMATED LEAD SCORING
AUTOMATE WARM LEAD NOTIFICATIONS
ENROLL PROSPECTS IN LONG-TERM SEQUENCES

CUSTOMER SERVICE/OPERATIONS
CONFIGURE IMPLEMENTATION PIPELINE
CONFIGURE A TEAM INBOX FOR SUPPORT
ADD A CHATBOT TO YOUR WEBSITE
IMPLEMENT CUSTOMER FEEDBACK SURVEYS
ADD A "REQUEST SUPPORT" FORM TO YOUR WEBSITE
LAUNCH A KNOWLEDGE BASE

ADD MORE IDEAS HERE...

MORE WORKSHEETS, RESOURCES. AND SUPPORT

use the QR code to download more worksheets and access more resources. You can also learn more about The Gist and schedule a Payroll + HCM Growth Consultation.