

Major Project on

Implementation of

LEAD MANAGEMENT SYSTEM

For Customer Support Solutions

(Using Hub-Spot)

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CERTIFICATE

This is to certify that the dissertation report titled “ **Implementation of LEAD MANAGEMENT SYSTEM For Customer Support Solutions** ” is a work carried out by **Mr. Pushp Ranjan Mishra** of **EMBA 2020-22** and submitted to Delhi School of Management, Delhi Technological University, Bawana Road, Delhi-42 in partial fulfillment of the requirement for the award of the Degree of Masters of Business Administration (Executive).

Signature of Guide

Signature of Head (DSM)

Place:

Seal of Head

Date:

DECLARATION

Myself, **Pushp Ranjan Mishra**, student of **EMBA 2020-22** of Delhi School of Management, Delhi Technological University, Bawana Road, Delhi – 42, hereby declare that the dissertation report **“Implementation of LEAD MANAGEMENT SYSTEM For Customer Support Solutions”** submitted in partial fulfillment of Degree of Masters of Business Administration (Executive) is the original work conducted by me.

The information and data given in the report is authentic to the best of my knowledge.

This report is not being submitted to any other University, for award of any other Degree, Diploma or Fellowship.

Pushp Ranjan Mishra

Place:

Date:

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Pushp Ranjan Mishra

(2K20/EMBA/29)

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ABSTRACT

The objective of organizations is to change over most extreme leads into promising circumstances. Associations that work in a circulated climate neglect to overcome any barrier between promoting office (the lead generator) and outreach group (the controller). Most organizations neglect to control this income drainage that influences the partners and result of arrangements.

Organizations need to use mechanized mechanical answers for rapidly achieve voluminous excess work for their endurance in aggressive business sectors. Quick organizations have more limited durational ranges for settling a negotiation. One individual's misfortune becomes another people's benefit. A slight misusing and you may lose an important chance to your rival.

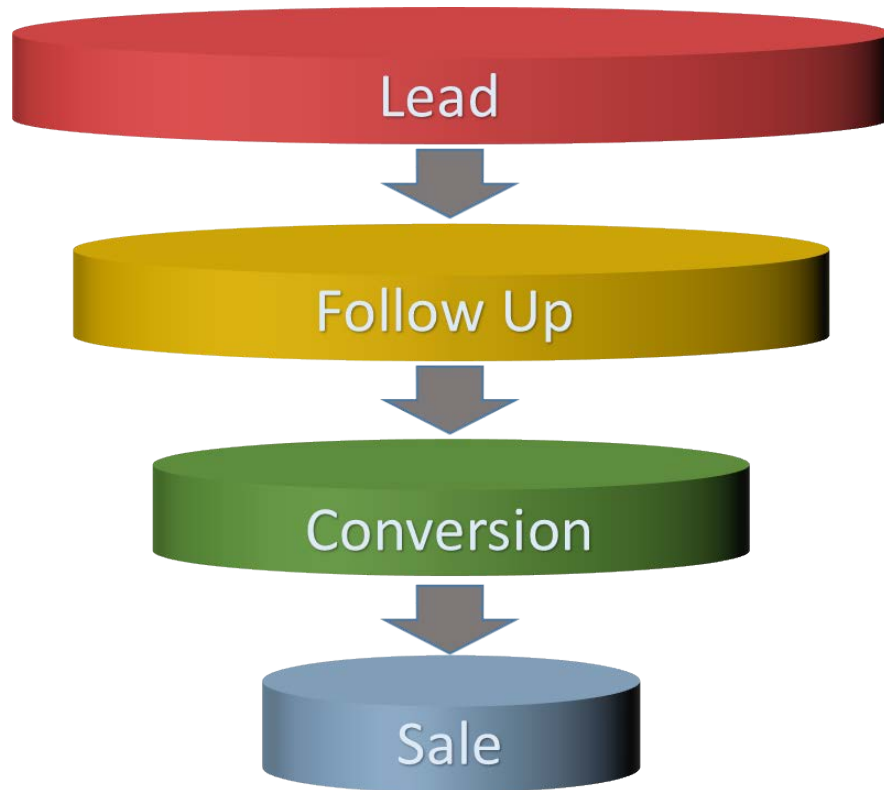
INTRODUCTION

Leads are inappropriate contacts with potential exchange value. These are roughly divided into 3 categories, Cold, hot and warm, depending on the level of interest. Hot leads are the most likely changes that can be described as prepared transactions, and “warm” leads have opportunities for future transformation. Leads with a peripheral interest in articles or management, on the other hand, are considered "cold."

- Excellent lead management system
- Speed up the process
- Reduce the lead generations costs
- Control leads training costs
- Increase the conversion rate
- Monitor the rate of return on investment

FUNCTION

Product arrangements that enable consistent collaboration for business practices regarding meaningful information are contained in a wider area of business management systems. Lead Age and Executive Work are known as presentations, and individual transactions are the customer confrontation department of a B2B company.



MAJOR BENEFITS

Eliminate manual operations

A decent Lead Management Solution mechanizes the work process according to characterized industry guidelines. The interface catches every one of the records depends on which salesmen decide the lead quality and handle their appropriation. It likewise offers assistant promoting apparatuses like mission supervisors and item features to sustain a possibility. A computerized LMS scores over a manual LMS for the beneath referenced advantages:

- Approach all leads at the same time
- Save money on lead development activities
- Clear identification of quality leads
- Easily delegate activities between colleagues and within the hierarchy
- Save a lot of time for marketing strategies and approaches

Predict results

Clients expanded perceivability on the cycle. Complete lead data is solidified at a focal area for future references like - source, locale, rate, classification, and so forth Deals faculty can allude to this data to decide the most proper methodology for the possibility. A record of all the data carries lucidity and straightforwardness into the framework. The administration can freely see their business capacities continuously. As various clients access the framework it turns out to be job based, with every client ready to see their objectives and exercises on their dashboard. Moreover, top of the line frameworks permit clients to coordinate their dashboard parts themselves.

THE CHALLENGE

Ascension can improve many positions, but human touch cannot be denied. Face-to-face encounters or hits create a closer affinity and provide condition override testing. The electric system forgets to provide an insightful sensation that the human mind can ponder. Carefully crafted responses, on the other hand, can affect customer associations.

In addition, such programming actions make the system more sensitive to security opportunities. As a result, we are forced to make wise progress that can increase wise use.

Nowadays, it's common to get in touch with leads easily or through news and publications. The association uses a mass information program to send various exhibition mailers. In any case, there are limits to such programming. Customers can easily send messages using these recordings without tracking the results. Recipients cannot respond to this record and the sender cannot actually see how many undelivered emails they have.

A BRIEF ABOUT LMS

LEADS

A lead is a recorded representation of a company's interest in a product or service, whether it's a new prospect or an existing customer. This is usually a list of potential customer names, addresses, phone numbers, and even shopping needs. This usually contains important information that sales reps need to reach out to potential customers. Lead generation is the process of getting those leads.

LEAD GENERATION

Customers can use the Internet to search for items and services offered by businesses on a variety of platforms. This has led to a significant shift from the traditional model in which businesses collect information about potential customers to a more sophisticated approach in which consumers are both senders and receivers of information exchange. By tracking when prospects are considering something in their campaign program, these companies can use new, imaginative online marketing campaigns to promote their brands and generate leads online. Customers may visit the company's website for product descriptions and demonstrations, or may be asked some questions (such as contact information or product requirements). This information is then shared with sales reps, who contact these prospects and turn them into valuable customers. Lead generation is an integral part of an organization that sells products and services.

LEAD MANAGEMENT

The process of integrating, prioritizing, accrediting, and transforming incoming leads through campaign management or other sources (such as service support processes or sales-generated leads) into first-time customers or repeaters, Called lead management. Lead management combines tools and approaches to help you develop, manage, and track leads. It includes a well-organized set of systems and procedures that ensure that your sales track all generated and eligible leads. The table below shows how to manage leads.

Lead Management Process

Process	Descriptions
Enquiry Capture	Gathering request for information from prospect through marketing campaigns and web forms etc. Here, data and information required before making contact with a lead are collected.
Qualify Lead	This is the verification of a prospect's ability to make a purchase decision. A qualified sales lead according to Jolson (1988), is when the product or service can satisfy the prospect's needs, the prospect is willing to buy, and the prospect has the ability to buy.
Assign Leads	This is the allocation of leads to the appropriate inside sales person based on specific criteria, such as geographic region, product type, etc.
Score Leads	This is the grading or ranking of potential customers based on their likelihood to make a purchase decision. The score usually differs based on enquiry platform, product need, salesperson, geographical constraints and customer type.
Route Leads	Prioritizing and presenting the next best lead to call or follow-up on to the inside salesperson.
Nurture Leads	This involves fostering leads who haven't made purchase decisions yet through timely directed communications (i.e., email messages) until they grow up to prospective buyers.
Lead Tracking	Constant report on the sales <u>leads</u> status. It also includes providing statistical reports that allow marketing to evaluate return on investment for its different lead-generation programs.
Close Sales	At this point, the lead management process is completed. The objective of transforming a lead to a contact, first time or recurring purchases has been achieved.

Currently, lead management systems can be roughly classified into List-based and Queue-based systems.

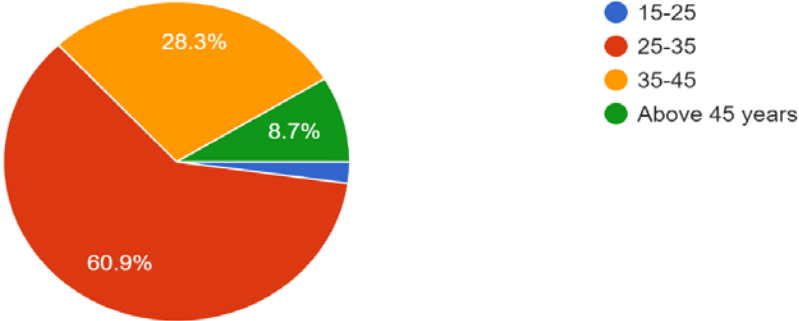
- **List-Based Systems:** A list-based lead management system presents a sales representative with a long list of leads and it is upon him/her to filter and select which lead he/she wants to manage. Lead selection here relies heavily on the individual salesperson's decision making capability. When a salesperson is done with a lead, he/she goes back to the list to find the perceived next best lead to contact. Today, most software vendors develop and deploy lead management systems with a list-based routing platform, and as a result, it is the most commonly used lead management system by sales organizations.
- **Queue-Based Systems:** A queue-based lead management system uses predefined business rules and a configured workflow sequence to automatically filter and present a salesperson with the next-best lead to manage. When a salesperson is done with a lead and enters the result of the call, the system automatically assigns the next best lead to the salesperson to contact. The result of calls must be entered for the system to automatically determine when and if the lead should circulate back in sequence. This system allows organizations to implement a standardized workflow process for managing leads by salespeople and only allows a salesperson to work on the prioritized lead presented. Here, decisions on leads to manage by which salesperson is reliant on the system based on predefined business rules set by the organization.

SURVEY RESPONSES

At the end of the survey, we collected a total of 46 responses (25.3% response rate). However, 14 responses were incomplete and 46 valid responses remained, as respondents did not have to complete the entire survey.

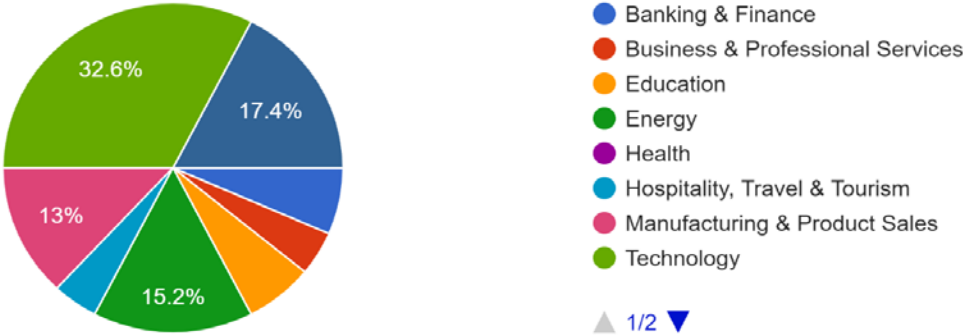
Age Group

Age (years)
46 responses



Industry Representation:

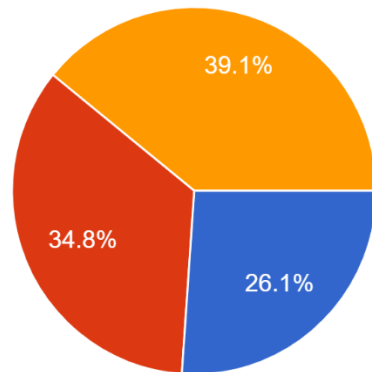
What Industry does your company represent?
46 responses



Business Model of Respondents:

What business model best describes your company?

46 responses

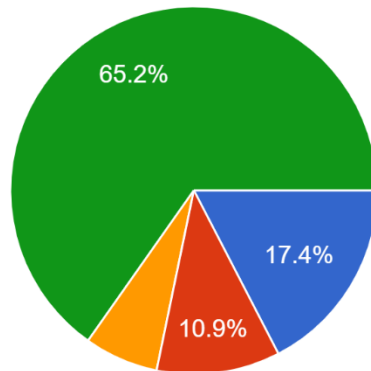


- Business-to-Consumer (B2C)
- Business-to-Business (B2B)
- Both

Company Size of Respondents:

What is the size of your company?

46 responses

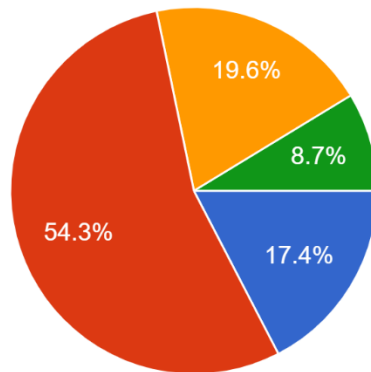


- 1-50 Employees
- 51-250 Employees
- 251-500 Employees
- Over 500 Employees

Positions of Respondents:

What is your position in your company?

46 responses

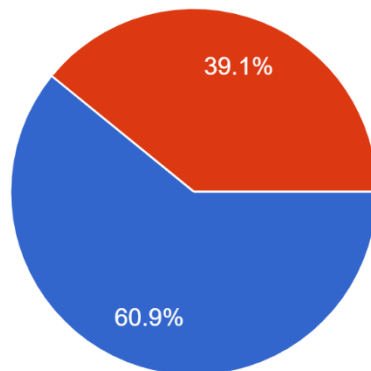


- Administrative / Support personnel
- Supervisor / Manager
- Top Level Executive
- Other

Type of Lead Management System of Respondents

What type of lead management system do your salespeople use?

46 responses

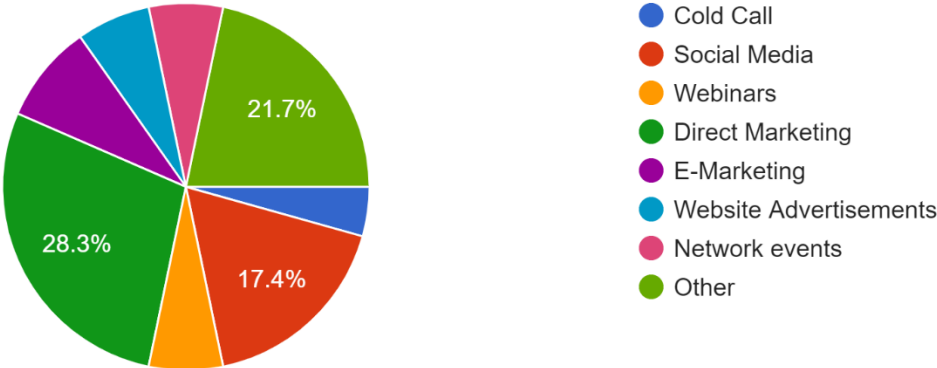


- List Based system (i.e. your salespeople always go back to a list to a list to select the next lead to contact)
- Queue Based system (i.e., your lead management system automatically serves your salesperson with the next lead to contact)

Methods used for prospecting

Which methods does your company use for prospecting?

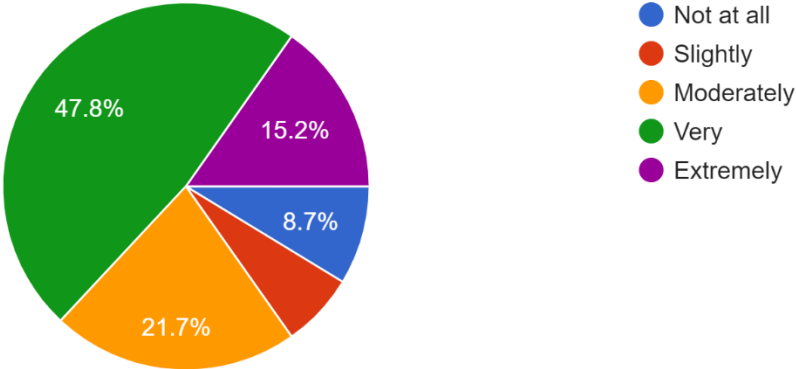
46 responses



Importance of Lead Generation for a company:

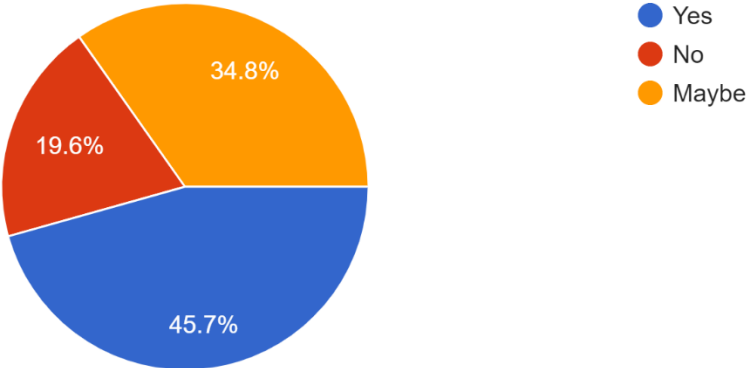
How important is generating leads to your company?

46 responses



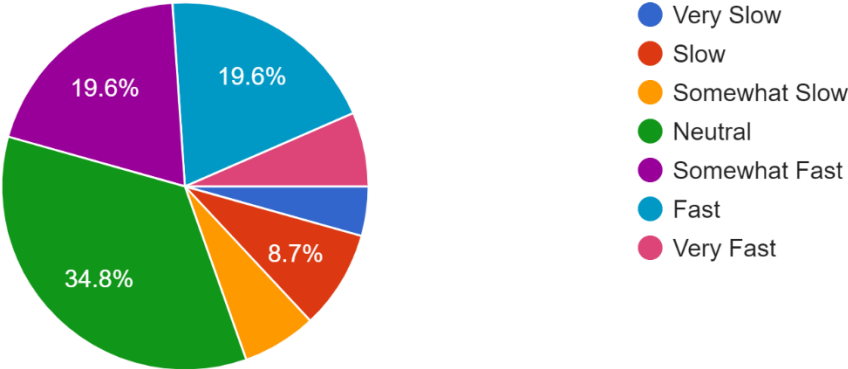
Would you agree that your salespeople log every sales call?

46 responses



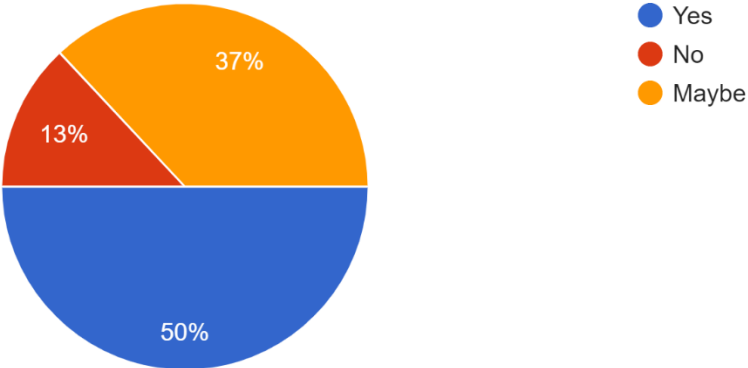
Please indicate how fast your salespeople make their first contact attempt with a new lead?

46 responses



Do your salespeople work on real-time web-generated leads?

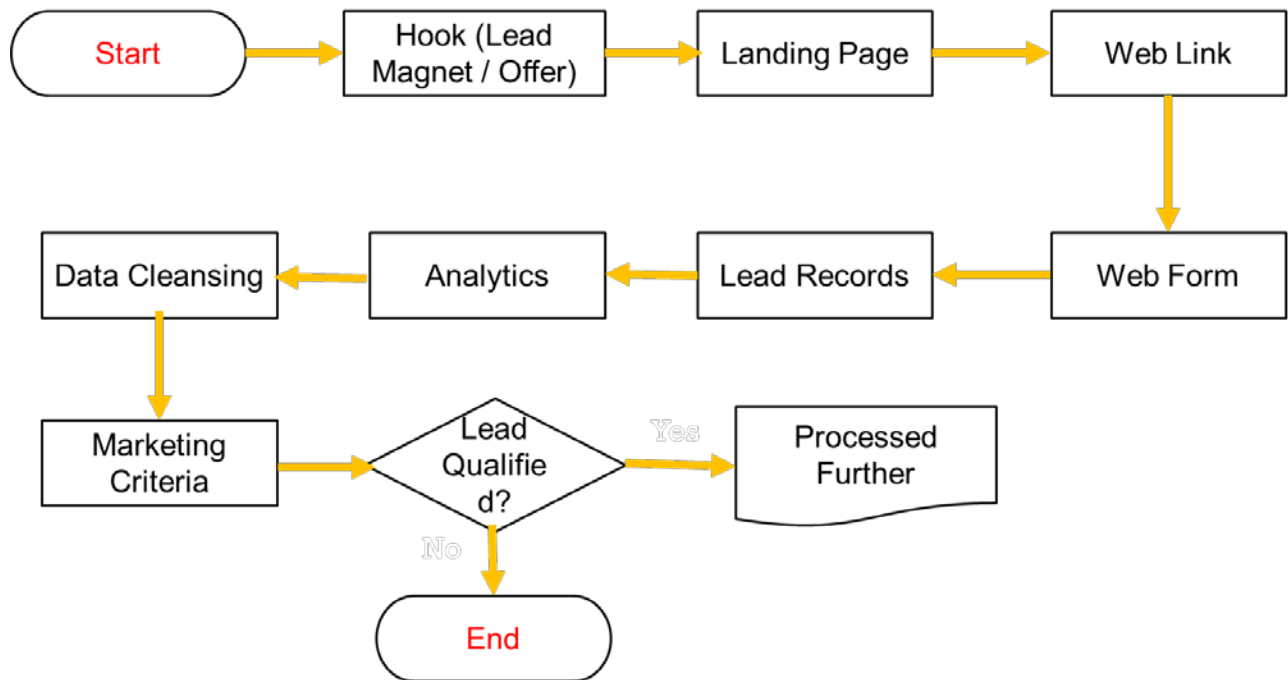
46 responses



LMS IMPLEMENTATION

Organization : Technical Offerings & System Solutions Pvt Ltd
Sector : Information and Technology
Core Business : Call Center Solutions & Software
Tool Used : HubSpot

Lead Generation Flow




WEB FORM CREATION


Selecting Form Type

Choose your form type


What kind of form would you like to create?




Embedded form
Create a form that you can embed as part of your website.




Standalone page
Create a form on a standalone page that you can share through a link.




Pop-up box
Add a form that pops up as a box in the center of the page.



Dropdown banner
Add a form that will drop down from the top of the screen.



Slide in left box
Add a form that slides in from the left side.



Slide in right box
Add a form that slides in from the right.

Form Field Items

- First name
- Last name
- Email *
- Phone number
- Street address
- City
- State/Region
- Country/Region
- Mobile phone number
- Company name

No fields selected You must have at least one field on your form to publish.

Drag and drop a form field here

Submit

Security Terms

CAPTCHA (spam prevention) 



GDPR options 

None

None

Consent checkbox for communications; form submit as c...

Show consent to communicate checkboxes and consent to process text

Consent checkboxes for communications and processing

Show consent to communicate and consent to process checkboxes

Legitimate interest

samparkccs is committed to protecting and respecting your privacy, and we'll only use your personal information to administer your account and to provide the products and services you requested from us. From time to time, we would like to contact you about our products and services, as well as other content that may be of interest to you. If you consent to us contacting you for this purpose, please tick below to say how you would like us to contact you:

I agree to receive other communications from samparkccs.

You can unsubscribe from these communications at any time. For more information on how to unsubscribe, our privacy practices, and how we are committed to protecting and respecting your privacy, please review our Privacy Policy.

By clicking submit below, you consent to allow samparkccs to store and process the personal information submitted above to provide you the content requested.

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Privacy Terms



Submit

Chat

Ticket Generation

 File upload

 Resolution

 Category

 Priority

Ticket name *

Ticket description *

 Source

Ticket name * *subject* Ticket Property

Ticket description * *content* Ticket Property

Submit

Creating Follow Up Mail

Follow-up emails are a great way to quickly and easily contact your visitors once they submit a form.



Create follow-up email

Create Email

From user *

Pushp Ranjan (ranjan.pushp@g... ▼

From name

Pushp Ranjan

Subject line *

Enter an email subject line

Body *

B *I* U ≡ More ▾

Creating Follow Up / Thank You Mail

What should happen after a visitor submits this form ⓘ
(Required)

Display a thank you message Redirect to another page

B *I* U A ▾ ≡ ▾ ☰ ▾ ⌘

🔗 📧 😊

Thanks for submitting the form.

Follow-up options ⓘ

Send submission email notifications to the contact's owner. [Learn more](#)

Send submission notifications to ⓘ

ranjan.pushp@gmail.com ×

Link Generation

Your updated form has been published



Add this form to your website to start getting submissions. If **'New registration form (August 21, 2021 10:59:16 AM)'** form was added to your website before, any updates will be applied automatically.

Share link

Embed code

Start sharing your form with contacts. Your form has been securely published and ready to use at the web address below.

<https://share-eu1.hsforms.com/1vTW9PWUz>

Copy

[Preview link in new tab](#) 

Captcha Verification

Email *

testmail@mail.com

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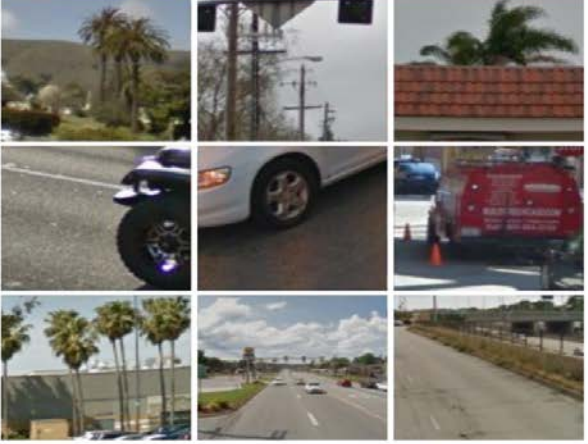
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personal information to provide you the services you requested. From time to time, we may contact you via email with promotional offers that may be of interest to you. If you do not wish to receive this information, you may opt out at any time. If you do not consent to us contacting you in this way, please do not click the button below.

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Privacy · Terms

Submit

Create your own free website with Wix

VERIFY

Form Submission Confirmation



Thanks for submitting the form.

Lead Details

Contacts 6 records Actions Import Create contact

All contacts
My contacts
Unassigned contacts
+ Add view
All views

Contact owner
Create date
Last activity date
More filters
Table actions
Save view

<input type="checkbox"/>	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
<input type="checkbox"/>	T Pushp Test	testmail@mail.com	--	Unassigned
<input type="checkbox"/>	A hgh hjh	abc1@gmail.com	--	Unassigned
<input type="checkbox"/>	R abc abc	ranjan@gmail.com	--	Unassigned
<input type="checkbox"/>	A abc abc	abc@gmail.com	--	Pushp Ranjan (ranjan.pushp)
<input type="checkbox"/>	B Brian Halligan (Sample Contact)	bh@hubspot.com	--	Unassigned
<input type="checkbox"/>	M Maria Johnson (Sample Contact)	emailmaria@hubspot.com	--	Unassigned

Lead Details

< Contacts
Actions

PT Pushp Test
testmail@mail.com

Note Email Call Log Task Meet

About this contact

Email
testmail@mail.com
● Email was recently updated to testmail@mail.com by a form submission.

Phone number

Contact owner

Last contacted

Search activities

Expand all Collapse all

Activity Notes Emails Calls Tasks Meetings

Filter by: Filter activity (19/21) All users

August 2021

Lifecycle change Aug 21, 2021 at 12:34 PM GMT+5:30

The lifecycle stage for this contact was updated to Lead. [View details](#)

Form submission Aug 21, 2021 at 12:34 PM GMT+5:30

Pushp Test submitted **New registration form (August 21, 2021 10:59:16 AM)** on **New registration form (August 21, 2021 10:59:16 AM)**.

This contact was created from Direct Traffic from Aug 21, 2021 at 12:34 PM GMT+5:30

share-
eu1.hsforms.com/1vtw9pwu2stmpwzmtcqkpyq
vh7m

Company (0) + Add

See the business or organization associated with this record.

Deals (0) + Add

Track the revenue opportunities associated with this record.

Tickets (0) + Add

Track the customer requests associated with this record.

Attachments Add

See the files attached to your activities or uploaded to this record.

Performance

EXPORT

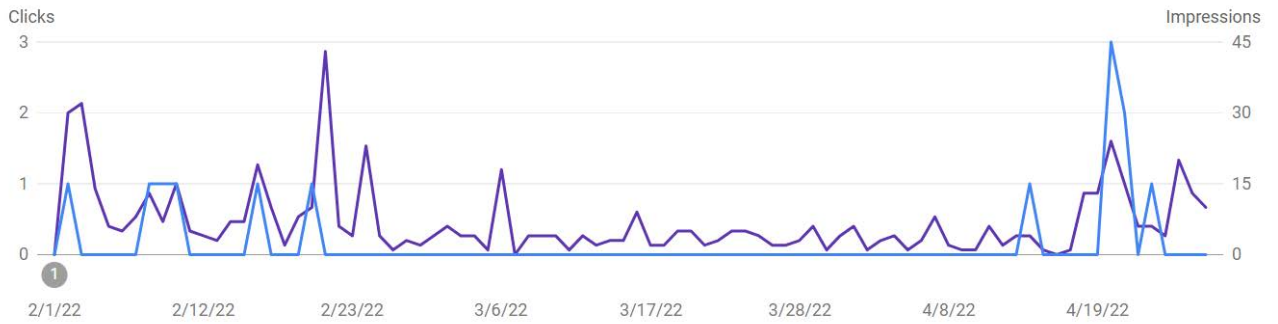
Search type: Web

Date: Last 3 months

+ New

Last updated: 4 hours ago

<input checked="" type="checkbox"/> Total clicks 13	<input checked="" type="checkbox"/> Total impressions 585	<input type="checkbox"/> Average CTR 2.2%	<input type="checkbox"/> Average position 5.1
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CONCLUSION
(PRACTICAL IMPLICATIONS)

The discoveries of this study furnish industry professionals with a few vital bits of knowledge.

For example, we observed that sales representatives who really use lead the board frameworks increment their deals execution through task effectiveness, further developed deals conduct, and advanced data based abilities and information. Utilizing lead the executives frameworks might assist salesmen with staying informed concerning their market and specialized ability. It additionally furnishes them with the appropriate devices to actually show their items and administrations while supporting quality discussion with leads.

At last, remote selling in the present quickly it is turning out to be more intricate to develop economy. Salesmen need to commit extra exertion, have powerful and focusing on ranges of abilities, be extremely versatile and similarly learned about their leads, item classification, and market settings to advocate deals in within deals industry effectively. Accordingly, the utilization of lead the board frameworks is a useful choice for sales reps to coordinate into their deals interaction.

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