



SmartLeads

Don't let your company's precious leads fall through the cracks

Your company spends a significant amount of time and money generating new sales leads. But what happens to those leads after they're identified? How often do they fall through the cracks — either because they're routed incorrectly or because the person receiving the lead has no bandwidth to follow-up?

SmartLeads, available as an add-on module to SmartOffice®, can help ensure the value of every captured lead. Designed expressly for insurance and financial services organizations, SmartLeads helps your organization effectively manage and distribute new leads, getting them in the hands of those who can convert them to sales.

A Better Lead Management Cycle

Whether you automate lead assignment using the rules engine, or manually forward them to the field office or rep, SmartLeads tracks each lead and seamlessly routes it to the right person. And because hot leads require near-immediate response, the system automatically alerts recipients to the new lead, provides immediate access to lead information, supports literature fulfillment, and monitors lead follow-up. Management can view statistics on aging leads via the Leads Dashboard, and then use the system to quickly reassign leads as appropriate. Integration with SmartSeminars and SmartOpportunities makes it easy to measure the effectiveness of specific marketing campaigns by tracking lead follow-up and monitoring the close of new business that results from each event. No matter how each lead is generated — via seminars, campaigns, or other marketing touch points — SmartLeads helps qualify each opportunity, track its progress, and analyze the outcome to determine the true success rate of each program. The result: fewer stale leads, immediate follow-up on hot leads, and greater accountability across the organization.

DATASHEET

- *Easily capture, qualify, route, and track sales leads*
- *Keep leads from going stale in the pipeline*
- *Improve the conversion rate of leads to sales*
- *Measure the impact of marketing programs*

SmartLeads provides these valuable features:

- > **A Dynamic Leads Dashboard** drives sales team effectiveness by providing graphical views of key leads data within SmartOffice. Management can analyze leads-based statistics to make smarter business decisions, view leads based on their current status, and see whether follow-up is occurring and which leads are resulting in closed sales.
- > **A Role-Based Sales Workflow** makes routing leads easy and effective. Leads can be routed to managers from a variety of sources, and then automatically assigned to your sales team — all from within SmartOffice. The workflow guides your sales team as they move each lead through the sales process. The system facilitates the process by supporting everything from calendaring activities, to generating letters, to creating campaign workflows.
- > **Automated Workflows** can reduce the time and effort required to dispatch and assign leads. Using pre-defined rules regarding demographics, dispatch, flow control, and assignments, SmartLeads can automatically route leads to the correct recipients.
- > **A Web-Based Solution** provides users at all levels of the organization with access to the information they need, when they need it — regardless of whether it originates at the home office or at a regional office. By centralizing all leads information on the web, your entire team can access real-time leads data, and easily follow an established workflow to progress toward common goals.

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