Prospect Follow-up System
IBSWIN Sales Manager Plus
(Version 12.XX)

Quick Set-up & User Guide

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Introduction to the Prospect Follow-up System

The Prospect Follow-up System expands upon the existing functionality of the Sales Manager Plus prospecting module. It creates a simple way to manage and track all correspondence and follow-up with prospects via e-mail, letters, and phone calls through one simple interface.

As part of this system, sales agents are also able to schedule e-mails, letters, and phone calls by any number of days after a prospect's original visit date.

When the follow-up dates are triggered, the sales agent will receive a notification when logging into IBSWIN letting them know that what follow-up items they have scheduled with prospects.

This handy feature ensures that all the appropriate and necessary prospects follow-up is completed easily and on time.

Setting Up Scheduled Follow-up Campaigns (Scheduled Letters, Phone Calls, & E-mails)

Found under Setup: Sales: Prospect Follow-up System menu, you will find one screen that can be used for creating and managing all of your scheduled follow-up actions by project. This includes e-mail, letters, and phone calls and the list can be filtered by prospect ratings (see page # 3 for more information).

When inside the screen you will notice five main columns:

- **Prospect Action:** This is a predefined drop down allowing you to select whether the follow-up item is an e-mail, automated letter, or phone call.

- **Apply to Prospects with Rating:** If the follow-up item is limited to prospects of a certain rating then select from your predefined prospect ratings, otherwise select ALL.

- **Drive/Directory/Document:** If you have selected Automated Letter as your prospect action, then when promoted, you will be able to select a merge document (please see page # for how to create a merge document) and this field will display the document.

- **Description:** This is where you can specify what this follow-up item is.

- **Day from Original Visit:** The number of days after the prospect's original visit date that you would like to contact the prospect.
To create a new entry, simply click on the **New** button and fill in the required fields. You can also **Copy** or **Delete** any entry.

**Changing Prospect Ratings**

If you wish to edit or modify your prospect ratings, you can do so under **Setup: Sales: Prospect Ratings**. This simple screen is a master list of ratings used throughout the prospecting system to filter reports and prospect lists, to do follow-up actions, pre-qualify your leads, and also for the reservation system. For more information, please refer to the *Sales Manager Plus User Guide*.

*Please note:* Phone calls can also be scheduled from the main prospect profile screen under the **Call follow-up** button. If the call you are entering is to be scheduled then you can enter a date in the **Date To Call** column.

**Using the Prospect Follow-up System**

There are two ways of processing any scheduled follow-up item that is ready to be processed. The first is when you login to IBSWIN and the second is by going directly to the **Sales: Sales Follow-up: Dashboard** menu once you are already working within IBSWIN.

In both cases, if you have either an e-mail, phone call, or automated letter, due to be processed then a pop-up will open, listing which type of follow-up items that have scheduled items. (see right)

Simply check the appropriate boxes and select **Ok** to continue or **Cancel** if you wish to exit and close the pop-up. IBSWIN will then prompt you to process each type of follow-up in the following ways:
• **Call follow-up:** When selected, this option will allow you to filter your list of scheduled calls by one or more sales agents. After doing so, a *Prospect Call Worksheet* will be generated for you to print. This worksheet will list all the calls that were scheduled to be made, including information such as: who to call, the lot they are prospecting, their contact details, and other call-related information as entered at the time of scheduling.

**Important:** As each call is completed, you will need to enter the prospect record and go to the Call follow-up button to check the Call Complete field, so you are not prompted to make the call again. You will also be able to enter the results of the call for reporting and tracking purposes.

• **Automated letters:** This option will allow you to generate letters for any prospect that is due for a follow-up. Initially, you will be prompted to choose a project from which you can select one or more prospects to generate letters for. (see below)

From this screen, you will select which letters you wish to send by checking the **Send It!** column. The **Delete It!** check box allows you to delete the scheduled letter if you decide that a particular prospect does not require it.

The **Send All** and **Delete All** buttons will select all the prospects in the respective columns and the **Print** button will automatically generate the letters. Microsoft Word will open and your merge letters will be created individually for each prospect. These can be edited and customized if required before printing and mailing them just like any other document.

• **E-mail follow-up:** This option is similar to Automated Letters. For any given project, you will be able to select from a list of prospects that have e-mail follow-up scheduled.

Simply check the **E-Blast** column for each prospect you wish to follow-up with or select them all using the **Select All** button. Then, using the e-mail button, Outlook will open a new e-mail ready for you to send with the e-mail address of each prospect inserted into the Bcc field. From there you will be able to write and send the e-mail.

**Please note:** To send individual e-mails to each prospect, you will need to select and process each prospect one at a time.

For more information about the prospecting module please refer to the *Sales Manager Plus User Guide.*