#WIBN – CRM SECRETS

Your Host

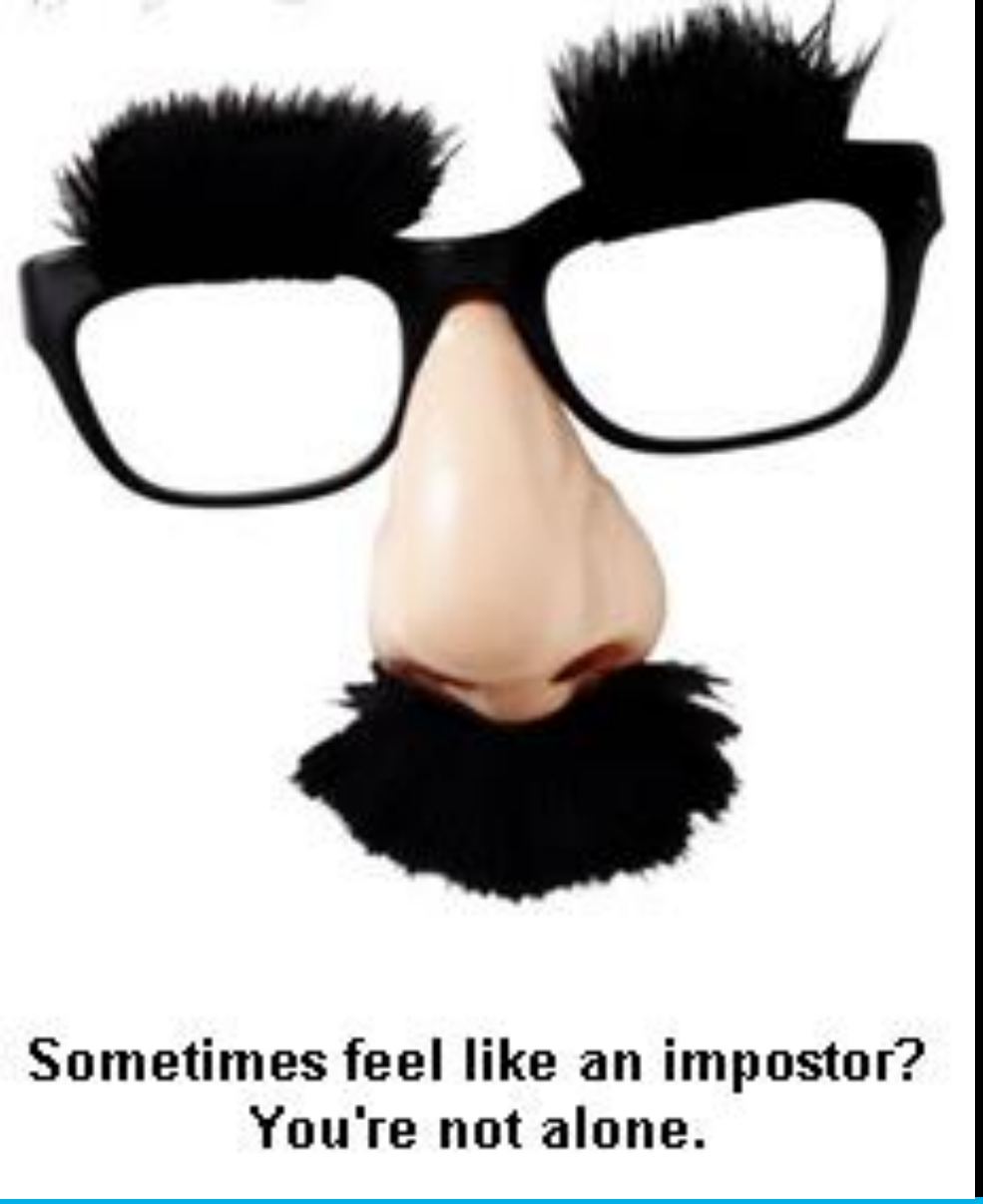
Leigh Mitchell is the founder & president of Women in Biz Network. Leigh specializes in professional development for women through skill building events, conferences, memberships, webinars and marketing services. Leigh is passionate about connecting women online across North America and in person throughout Canada and is considered to be one of Canada's leading small business ambassadors. Her goal is to create happy and inspired entrepreneurs that feel empowered with greater productivity. Leigh has successfully assisted many leading brands to engage with the WIBN community. Brands include: GM Canada, Microsoft Canada, Telus, Johnson & Johnson, Maple Leaf Foods, TD Canada Trust, Staples Canada and Random House. These organizations believe in power, influence and value professional women bring to the economy. Leigh has been featured on CBC Radio, the Toronto Star, the Globe & Mail and in other media and has been a featured speaker at Blissdom Canada.

Connect with Leigh on Twitter @womenbiznetwork

Sales Stereotyping

- Pushy
- Fast talker
- What else?

"A leader take people where they want to go. A great leader takes people where they don't necessarily want to go, but ought to be" Rosalynn Carter



- Everyone is part of sales cycle
- How does it make you feel?
- Do you outsource sales?

Sales Sydrome

- You can do it. Sales is not evil
- What is your greatest fear?
- How do you manage your sales?
- Do you have a sales team?

Got a System?

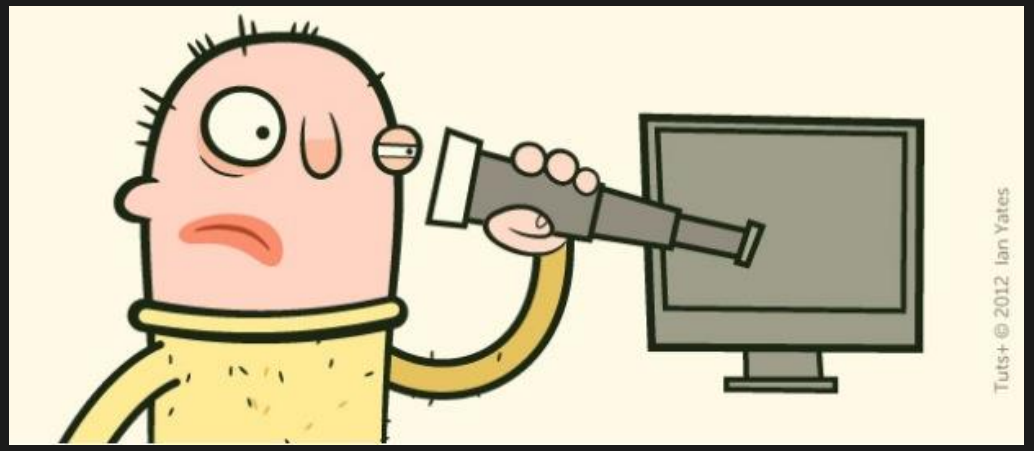
Marketing & Sales

Good Marketing Leads to LEADS!

Sales Considerations

- Do you have a sales package?
- Rate card?
- Is it pretty, informative and impressive?
- What you customers want to know: Analytics and Return on Investment?
- Testimonials
- Web site
- Tracking customers
- **Segments of customers and segments in the sales process**

What is CRM?

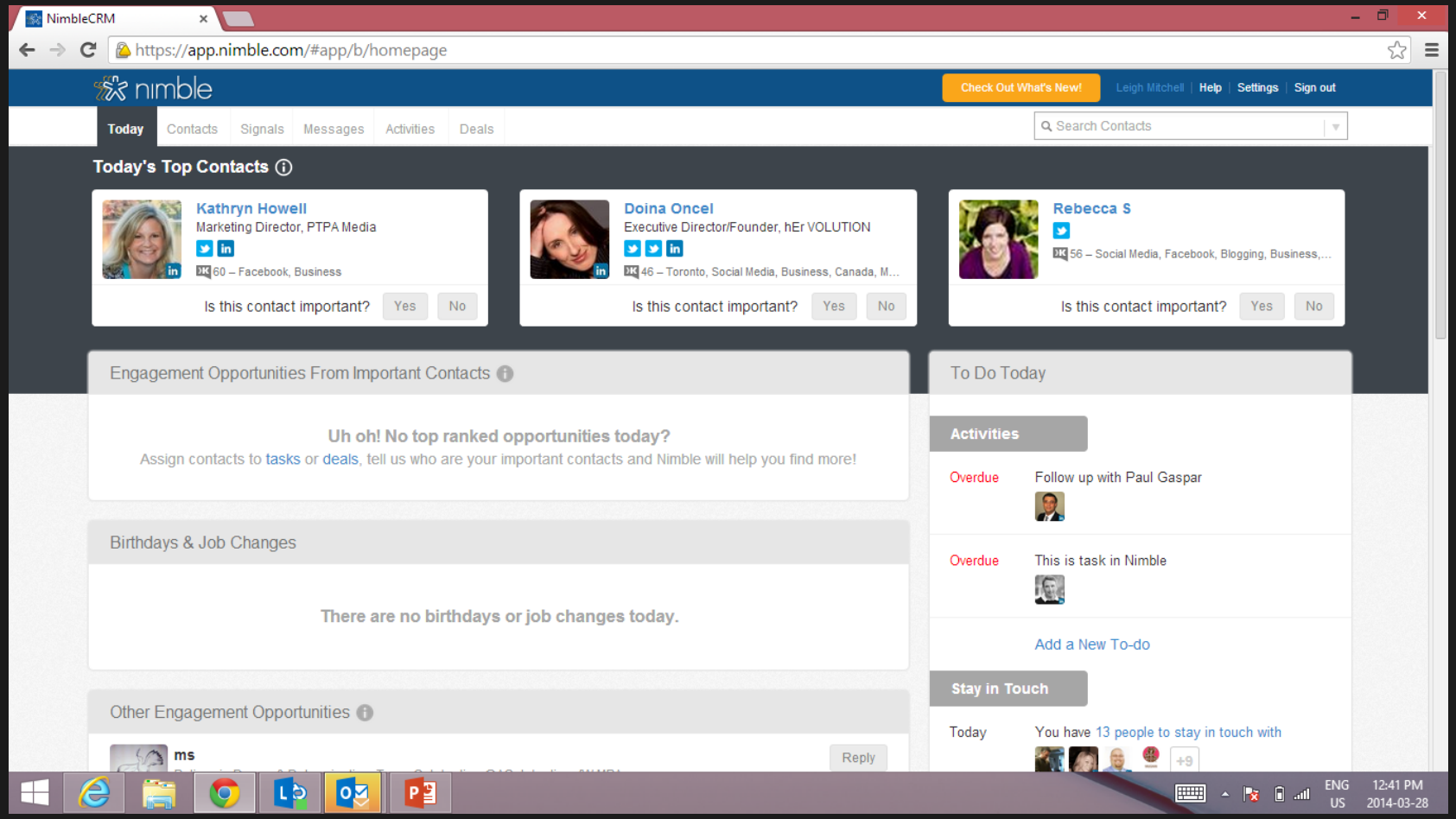


- Building relationships
- Organizing relationships
- Creating a system to build sales and follow up

What Tools are Available

- Nimble – Social Sales
- Green Rope
- Salesforce
- Sugar CRM
- Others?

Managing Leads with CRM – SEGMENTING & TAGGING



People
Companies
Marked Important
Recently Viewed
Recently Added
Recently Contacted
Stay in Touch

Group By

Company
Title

Saved Searches Add

Tags Unselect 2 tags

C CEO
Conference Attendee
csv import

D DesireMap

E Event Space Toronto

F facebook

G google

J January29thevent

Merge Export

View type: Sales view

Sort by: Last Contacted by t...

Name	Lead Type	Lead Status	Email	Last Contacted	Phone
Roger Pierce, Pierce Content Marketing	—				
Elisabeth Napolano, TELUS	—				

Premium Web Cart Inc. - | Cart - Email Manager | CRM - Dashboard

https://www.pwccrm.com/Dashboard.php

Customer Relationship Manager

"Powerfully simple automation that drives your business and boosts your sales"

PremiumWebCart

Logout

Quick Start Guides

Customers
Add Customer
Customer Management
Open Tasks

Sales Automation
Profiles
Content Library
Newsletter Broadcasts
Action Links - (Logic)
Opt-In Forms
Survey
Lead Score
Canned Messages

Test | Vancouver conference early bird response | ChevroletAttendees | Conferer

Dashboard

Getting Started Video

Scheduled Tasks

Vancouver confe... — Overdue (0) Due Today (0) Due This Week (0) Open Tasks

November28thEve... — Overdue (0) Due Today (0) Due This Week (0) Open Tasks

ChevroletAttend... — Overdue (0) Due Today (0) Due This Week (0) Open Tasks

Conference Staf... — Overdue (0) Due Today (0) Due This Week (0) Open Tasks

Conference Spea... — Overdue (0) Due Today (0)

Conference Coac... — Overdue (0) Due Today (0)

Conference Vend... — Overdue (0) Due Today (0)

Urban Retreat A... — Overdue (0) Due Today (0)

Risk Calculation

View Customers At Risk

Vancouver confe... | November28thEve... | ChevroletAttend... | Conference Staf...

No Customer Assigned | No Customer Assigned

Funnels

- Test
- Vancouver conference early bird response
- ChevroletAttendees
- Conference Staff
- Conference Speakers
- Conference Coaches
- Conference Vendors
- Urban Retreat Attendee
- Conference Attendee
- WIBN Member
- New Customer - new email optin
- New Member
- November28thEvent

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US 2014-03-28

Successful Negotiations

- How to do you react to no?
- Is there anything you would change in your next negotiation?
- Asking questions and solving problems

Have a Sales Plan – Update Regularly

“Success is most often achieved by those who don’t know that failure is inevitable” Coco Chanel

Build Relationships

- **Personal Touch**
- **Asking the right questions**
- **Don’t give up**
- **Learn as you go**

How can we help?

Upcoming Events

Passion to Profit Conference
April 28th in Toronto and
October 20th in Vancouver
Passiontoprofit.ca