



Checklist 16 - Lead Tracking And Software Option (CRM)

Project Name: _____ Date: _____

Yes No

To get a clear idea about the position of your company, lead tracking is helpful. With the help of it, you can categories your audience based on their actions. You can keep track of your marketing very easily by using software available for lead tracking. There are plenty of them, and three of them are discussed below in detail. CRM is used for optimizing customer relationships and interactions. It is Customer Relationship Management, so its functions are very clear from its name. Following is the complete guide about the use of ZohoCRM, SalesForce and Insightly:

Insightly:

- | | | | |
|---|---|--------------------------|--------------------------|
| 1 | Insightly is a customer management app, and it is used to manage a small business. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | With the help of this app, business leads can be optimized and tracked, and customer relationships can be improved. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | To get started on Insightly and implementing CRM by it; first, you need to open the Insightly software. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Then, go to the "Add New Lead" present on top of the page. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Now write the lead's information. | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



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6 This lead can be anyone who hasn't yet verified their interest in your website. ☐ ☐

7 After entering the Lead title, press "save." ☐ ☐

8 Now you can track your customers easily by Insightly. ☐ ☐

SalesForce:

1 SalesForce is a CRM software that helps all of the departments in an organization to have a combined look at their customers and helps in tracking the leads. ☐ ☐

2 To get started on this software, you have to create your campaigns. ☐ ☐

3 Now make your landing pages and URLs on this software so that customers get directly to your site. ☐ ☐

4 Moreover, you can set up automatic lead scoring so that you never miss any leads. ☐ ☐

5 Whenever a lead converts into contact, this means your site is making good progress, and your leads are managed. ☐ ☐

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ZohoCRM:

- 1 This Customer Relationship Management software is used by marketers to attract customers to get leads and to manage these leads effectively. ☐ ☐
- 2 You can add leads on Lead forms in Zoho software. ☐ ☐
- 3 Fill out all the details in the form, including the company's name, person's contact and business opportunity.
- 4 Every time that lead converts, it's a sign that you're gaining customers. ☐ ☐
- 5 These leads will then convert into potentials after they purchase something. So it'll become even easier to track leads. ☐ ☐

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