

innovia
CONSULTING



Business Central Relationship Management

Today's Presenter



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Opportunities falling through the Cracks?



How can we Prevent losing track of qualified Sales leads?

How can Business Central help you to keep Opportunities from falling through the cracks?

Good Initial Lead qualifying

- ✓ Utilize Questionnaires

Nurture Long Term Sales Leads

- ✓ More follow-up and relationship building with interactions
- ✓ Sales Cycles



An Organized Sales Process

- ✓ Sales Cycles, Logged Interactions and Tasks

Communicate Effectively

- ✓ Sales cycles
- ✓ Communicate on a timely basis
- ✓ Utilize Questionnaires – build your relationship

Studies show that Sales Opportunities increase by 20% with nurtured leads versus non-nurtured leads.



Today we will be covering:

- ✓ Questionnaires
- ✓ Interactions
- ✓ Opportunities
 - ✓ Sales Cycles / Stages / Activities / Tasks
- ✓ Campaigns
- ✓ Segments
- ✓ Outlook Add-in



Let's take a look.



In Summary:

- ✓ Questionnaires
- ✓ Interactions
- ✓ Opportunities
 - ✓ Sales Cycles / Stages / Activities / Tasks
- ✓ Outlook Add-in
- ✓ Campaigns
- ✓ Segments



Any Questions?



Thanks for Joining Us



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