

A close-up photograph of a white ceramic coffee cup filled with a latte. The coffee has a thick layer of foam with a heart-shaped latte art design in the center. The cup sits on a matching white saucer. A silver spoon is placed on the saucer in the foreground. The cup features a circular logo with a sunburst design and the word "COFFEE" at the bottom. The background is a colorful, abstract pattern with red, black, and white elements.

**GRAB YOUR COFFEE!**



**WHY SHOULD I USE  
A CRM SYSTEM  
CONSISTENTLY?**



- \* Run Campaigns
- \* Generate Leads
- \* Form a Database

Marketing

CRM

Sales

- \* Assign Leads
- \* Qualify Leads
- \* Convert Leads
- \* Track Opportunities

A CRM is like your own mini social network filled with details about the people most important to your business.  
Think of it as your personal assistant!





## **USING A CRM CONSISTENTLY WILL HELP YOU TO:**

- Keep your pipeline full of leads
- Follow up in a timely and systematic manner
- Prioritize sales activities
- Prevent leads from “falling through the cracks”
- Achieve sales (and income!) goals more easily and effectively



# USE THE CRM FOR ACCURACY AND CONVENIENCE



- No more losing names or numbers. It's all at your fingertips.
- Appointments are readily accessible
- Reminders for follow-up



# A CRM HELPS TO PRIORITIZE THE NEXT STEPS

- Moving a stalled relationship forward to their next step
- Leveraging and developing relationships are foundational to any successful sales position. Extend your advantages well-beyond the initial steps to get your foot in the doors of families you want to serve. Maintaining the right relationships with the right people have the potential to accelerate the sales process, facilitate buy-in from other community members, and reinforce the value YOU bring to the table.
- Less than 20% of sales and marketing professionals are very confident in how they move prospect relationships forward to a next step.



# USE THE CRM TO GET TO KNOW YOUR RESPONDENTS

- Knowledge is Power.
- Knowing who you're targeting is critical to your success.
- Utilize the notes section for personal information.
- Keep detailed activities so you have the last conversation at your fingertips when you get a call.



**K** KNOWLEDGE  
**E** EMPOWERS  
**Y** YOU



# BUILDING THE RELATIONSHIP WHILE USING YOUR CRM

- The answer lies in the ability to build, nurture, and leverage relationships.
- Though technology has made it easier to connect with others, it comes with the caveat that we must also try harder to make a good first and lasting impression.
- In an age of automation, one needs to bring more to the table: **the power of a relationship.**

“All things being equal, relationships win. Your intentions matter, and they are felt by your clients, your prospects, and all of the people whom you interact.”

**Anthony Iannarino**



TESTIMONIAL

**DON'T JUST TAKE OUR WORD FOR IT.**





## TESTIMONIAL

“I primarily use PLD for tasks and the calendar. It’s nice to see all my appointments and to-do’s on one screen. I like to take detailed notes so I can access my notes from anywhere in one location.”

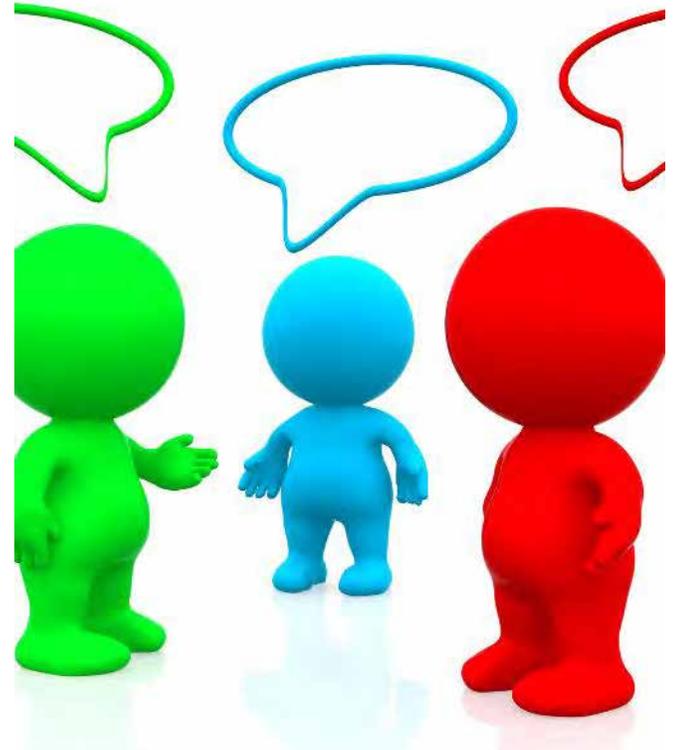
**Jake Kramer**



# TESTIMONIAL

“The main reason why I continue to use Pipeline as much as I do is simply, organization. It truly helps me keep my tasks on track. I know exactly who I need to contact each day and the last thing we discussed. It also helps me build a meaningful relationship with my family. I have leads that are years old, but I can continue contacting them regularly and stay in touch. By doing so, I am the person they remember when they have questions or are ready to begin planning (or if their family/friends want to plan). The other nice aspect of Pipeline is that I have everything with me all the times. I used to carry around a paper schedule to make sure I knew what I had going on day-to-day, just in case I received a call from a family while I was out at the grocery store or dinner. Now, everything is on my phone calendar and I can schedule appointments no matter where I am at. Without Pipeline, I know I would have a much harder time staying on track daily. I wouldn't be able to see the email I last sent to a family, or what we discussed when I called them 3 months ago. It simply makes my life easier and that makes it worth it to me.”

**Whitney Koehler**





# TESTIMONIAL

“The best part of PLD is being able to document the conversations I’ve had with specific leads. I contact a lot of families and it’s easy to forget the small details that matter. PLD allows me to focus on those specific conversations and build rapport.”

**Mitch Lindstrom**

# TESTIMONIAL

- “Pipeline has been an integral tool as I have transitioned over to an FDLIC Select Producer. It did take a while to learn the program, but now that I’m getting more familiar with it, it becomes easier and easier daily. To be a successful Select Producer, it is not possible without a lead management program such as Pipeline.”

**Walt Fuge**



# SO WHY WOULDN'T YOU USE YOUR CRM TO ITS FULLEST EFFECT?

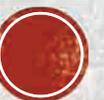
- A tool that can enhance your effectiveness
- Increase your sales
- Save you a lot of headaches
- Help you build relationships
- 75% of sales managers say that it helps to drive and increase sales (Hubspot)
- A CRM can increase revenue by a 41% per salesperson(Trackvia)
- Three out of four consumers say they spent more money with a company because of a positive customer experience. (Global Customer Service Study)
- 65% of sales reps who have adopted mobile CRM have achieved their sales quotas while only 22% of reps using non-mobile CRM have reached the same targets. (Innoppl Technologies)





MEETING APPOINTMENT GOALS WILL REQUIRE PURPOSEFUL ACTIVITY IN PIPELINE DEALS. THE FOLLOWING ARE HELPFUL HINTS AND TIPS TO BE MORE EFFICIENT AND EFFECTIVE IN THE SALES PROCESS:

- Enter contact information from lead source and obtain email address with very few exceptions
- Add 10 new leads or contacts per day (file folders, call-ins, auto leads, etc.)
- Enter updates and completions in activity section
- Update status on all leads weekly or right after activity or event
- Have next steps complete on all leads even for 6-month call backs for reviews or referrals
- Review and update contacts monthly and if can be converted to a lead





MEETING APPOINTMENT GOALS WILL REQUIRE PURPOSEFUL ACTIVITY IN PIPELINE DEALS. THE FOLLOWING ARE HELPFUL HINTS AND TIPS TO BE MORE EFFICIENT AND EFFECTIVE IN THE SALES PROCESS: CONTINUED. . .

- Review and update non-completed items weekly on Wednesdays
- Review and update People without Deals on the 15<sup>th</sup> of every month (begin to close for end of month production)
- Make sure all unfunded files are entered in PLD with next step (invite to L&L, email, etc.)
- All aftercare leads must have a follow-up timetable in place
- Update PLD and set up calls in PLD during non-calling hours



Don't make excuses  
for why you can't  
get it done. Focus  
on all the reasons  
why  $\Rightarrow$  you  $\Leftarrow$  must  
MAKE IT HAPPEN

