



TECH FALCON
Member of Lootah Holding

**Customer Success
Guide Series**

Lead Management

**What are the 4 Major Steps in
Implementing Successful Lead
Management Process?**

Lead Management

Lead management is a systematic procedure for qualifying, analyzing, and nurturing incoming leads in order to convert them into new business possibilities. Leads from various sources enter your Property 365 lead management system, and sales-ready leads are transformed into transactions in a conventional sales process. With Property 365 get leads and prospects directly via web form into your website. It will help you to analyze and turn your leads into opportunities. It can scour through your database to match leads with your existing customers and eliminate them automatically. Property 365 will help you to collect information and prospect follow-ups to streamline the lead nurturing process. Lead nurturing strategies have resulted in direct revenue gains for businesses.





Create Buyer Personas

The needs, ambitions, behaviors, and worries of the audience you want to reach are represented by buyer personas.

A successful buyer's journey should end in a purchase from the perspective of lead generation. However, because each consumer is unique, each buyer's journey is sure to be different. Approaching a varied audience without narrowing down the folks who make up that group might be intimidating. This is where buyer personas come into play. You may cut down your audience into manageable segments by profiling your customers and working with personas. A buyer persona is a representation of the type of customer you want to attract. The needs, ambitions, behaviors, and worries of the audience you want to reach are represented by personas. They reveal how your target market thinks, what motivates them to buy, and why they buy in the first place. It might help you figure out who is most likely to buy your goods. The first step in attracting high-quality leads is to do so. You can improve conversion rates, reduce sales cycles, and cut marketing costs by using excellent leads.

Personalize your Lead Capture Process

Buyer personas have distinct goals and needs, so approaching them with generic messages will waste the time and effort you put in to learn about them. It's critical to create material that speaks to their specific objectives. The more exactly your material represents how you can answer a prospect's specific demands, the more likely they are to put their trust in you. In order to attract leads effectively, you need to adopt a customer-centric approach in my lead management. One of the key tests of a self-proclaimed "customer-centric firm" is persona-specific content. Here are some tips for a more personalized lead management process:

Custom web forms:

Prospects come through a variety of sources and at different phases of the buying process. Create custom landing pages so that visitors can fill out different forms depending on how they arrived at your site.

Leverage chatbots:

It is the most efficient way to personalize the lead collection process. Prospects are more willing to share personal information in a discussion than they are in a traditional web form.

Test your landing pages:

To increase conversion rates and lead management, test different form fields, CTAs, and other elements on your landing pages.



Keep Stakeholders in the Loop

Everyone who handles leads must be consulted and instructed with high-scoring, high-value leads into their own pipelines as rapidly as possible.

During the sales process, everyone who handles leads must be consulted and instructed about their roles. Consider conducting internal training to ensure that everyone understands why lead management is so important and what their role is in the process. Inside salespeople and strategic account managers, for example, will want to get high-scoring, high-value leads into their own pipelines as rapidly as possible. Lead management in Dynamics 365 also aids the company in getting to know its target audiences, much like a CRM software suite aid in the development of individual customer relationships. Property 365, an extension of Dynamics 365 Real Estate Management Capture property inquiries and keep track of how leads and prospects are progressing. Webforms on your websites can be used to collect leads and prospects directly. These can be assigned automatically based on specified rules, and after data analysis, they can be further qualified into opportunities. Access prospect information, including notes and attachments, from any location, at any time, and plan all of your sales operations online.



Pass Off Your Leads to Sales

After collecting, selecting, and nurturing your leads, it's time to pass them on to Sales for taking direct action. Lead scoring can assist in ensuring that each lead is qualified.

After collecting, selecting, and nurturing your leads, it's time to pass them on to Sales for taking direct action. Check to see if your lead is ready to be passed on to sales and isn't too early. Lead scoring can assist in ensuring that each lead is qualified. To ensure that a lead does not require further nurturing, score carefully and appropriately based on the activity the lead engages in. Ensure that the sales team conducts additional research on the lead, gathering as much lead intelligence information as possible from both marketing and the internet in order to learn as much as possible about the lead before contacting it. This can include information such as the company's structure, present products/services, revenue model, and key decision-makers. To avoid reverting to nurturing, make sure each lead receives a quick initial contact. To stay on the prospect's radar before a prospective conversion, there should always be at least a modest amount of follow-up.

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