AimHigh CRM

# AimHigh CRM 3.1

## What's New

StrategyConsult
INFORMATION TECHNOLOGY LLC
where performance meets expectations

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# Getting Started

## Introduction to AimHigh CRM 3.1

At AimHigh CRM, our vision is to help our customers deliver the kinds of amazing customer experiences that will help their business thrive. We believe that there has traditionally been a chasm between marketing and sales that needs to be bridged in order to truly deliver personalized, end-to-end experiences that customers will love. In a world where sellers and marketers must work more closely together to seamlessly and successfully engage customers, AimHigh is providing the solutions that can enable them to deliver amazing customer experiences together. By aligning your organization around what matters most, companies will be able to drive greater success and engagement with their customers.

### In this content…

What's New in AimHigh CRM 3.1

- Managing Campaigns.
- Convert Leads.
- Qualify Opportunities.
- SMTP Settings.

# Marketing

# Planning Campaigns

Campaigns are containers for all of the information, campaign activities you need to manage for the marketing campaigns.

# Work with Campaigns

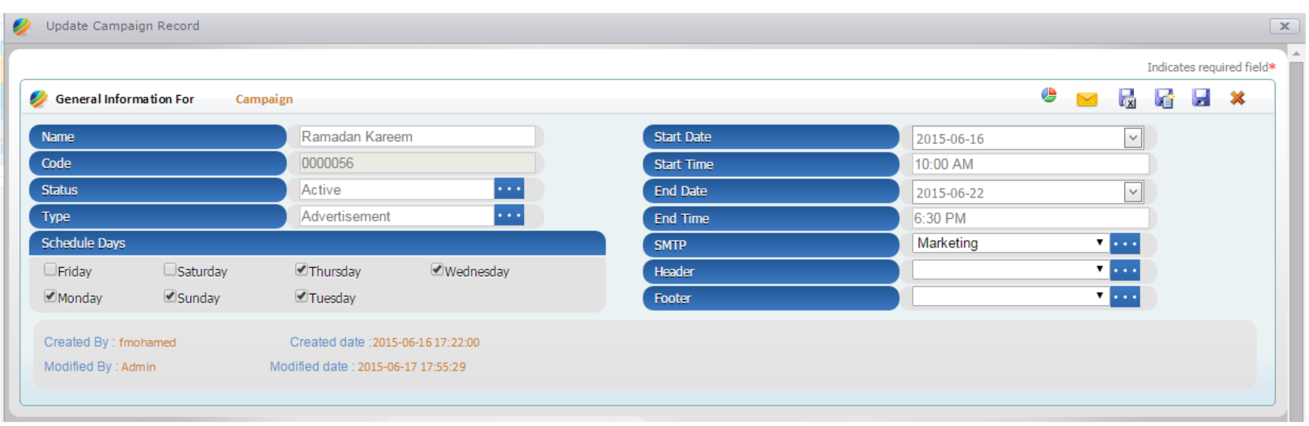
Can I do this task?

This task requires permissions that are found in all default marketing security roles.

The only difference between campaigns and campaign templates is in how you save the record. You can add planning tasks, campaign activities, marketing lists, sales literature, and products to both campaigns and campaign templates. Use a campaign to plan and track each of your marketing campaigns.

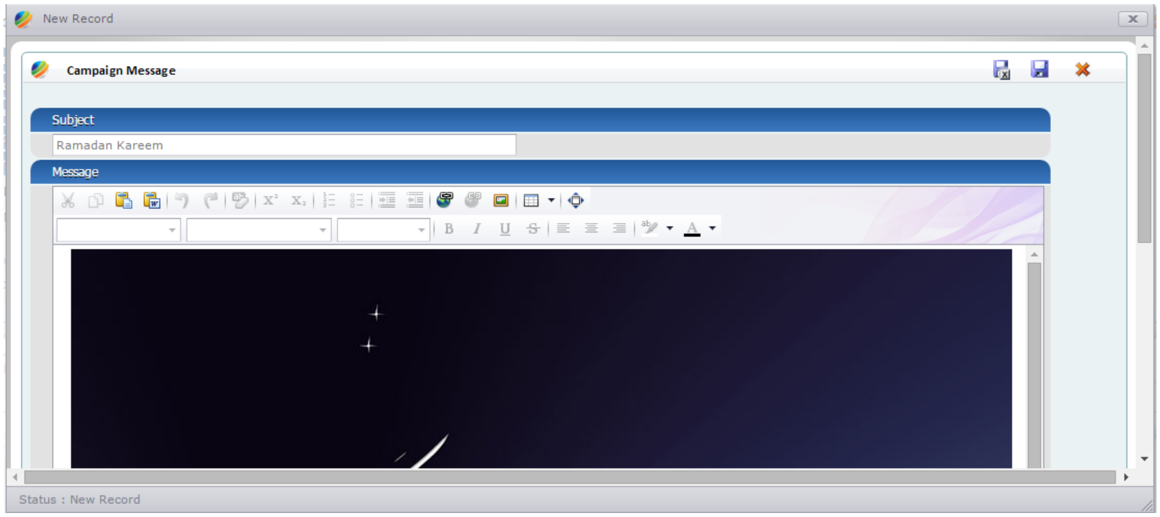
# Create or edit a campaign

1- In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2- In the Grid View group, click **New**.
3- Under **Information**, enter the information that you have for this campaign.




4- Select days during which you want to send the campaign.
5- Select SMTP settings to use.

6- Create your message by clicking on the icon



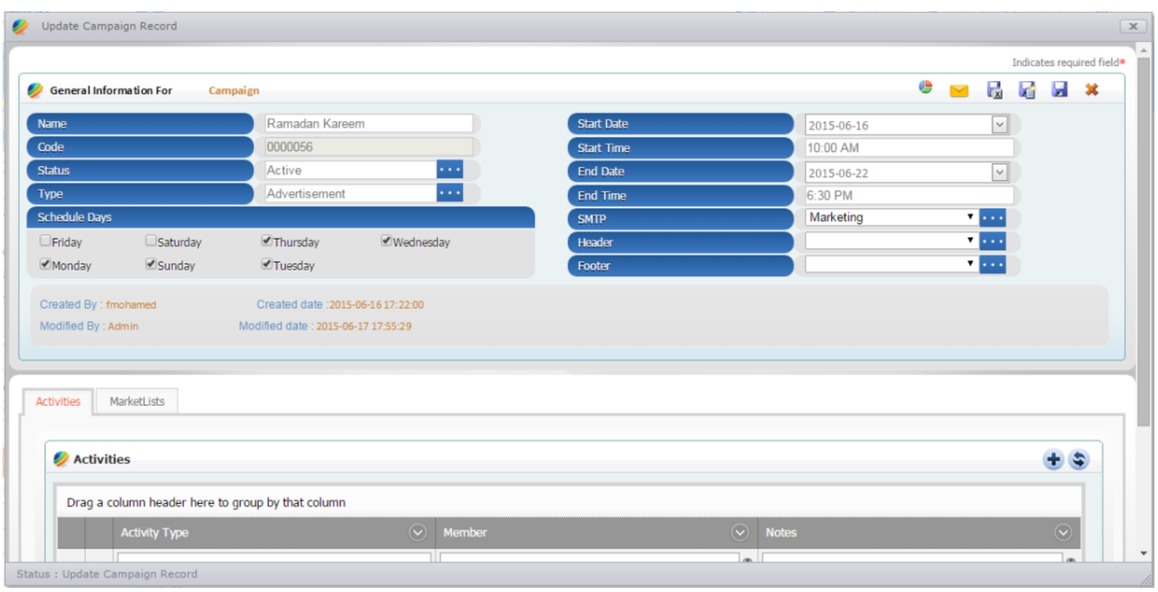

7- Click **Save** or **Save and Close**.

# Work with campaign Dashboard

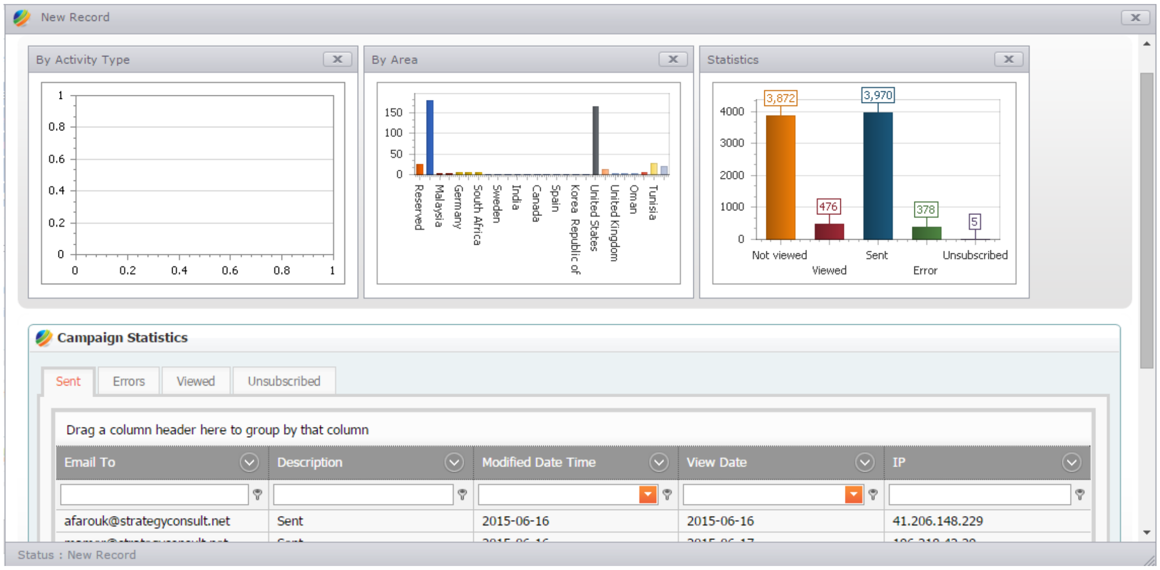
Can I do this task?

This task requires permissions that are found in all default marketing security roles.

1- Open campaign details.



2- To view the campaign dashboard click the icon 



# Add a marketing list to a campaign

Can I do this task?

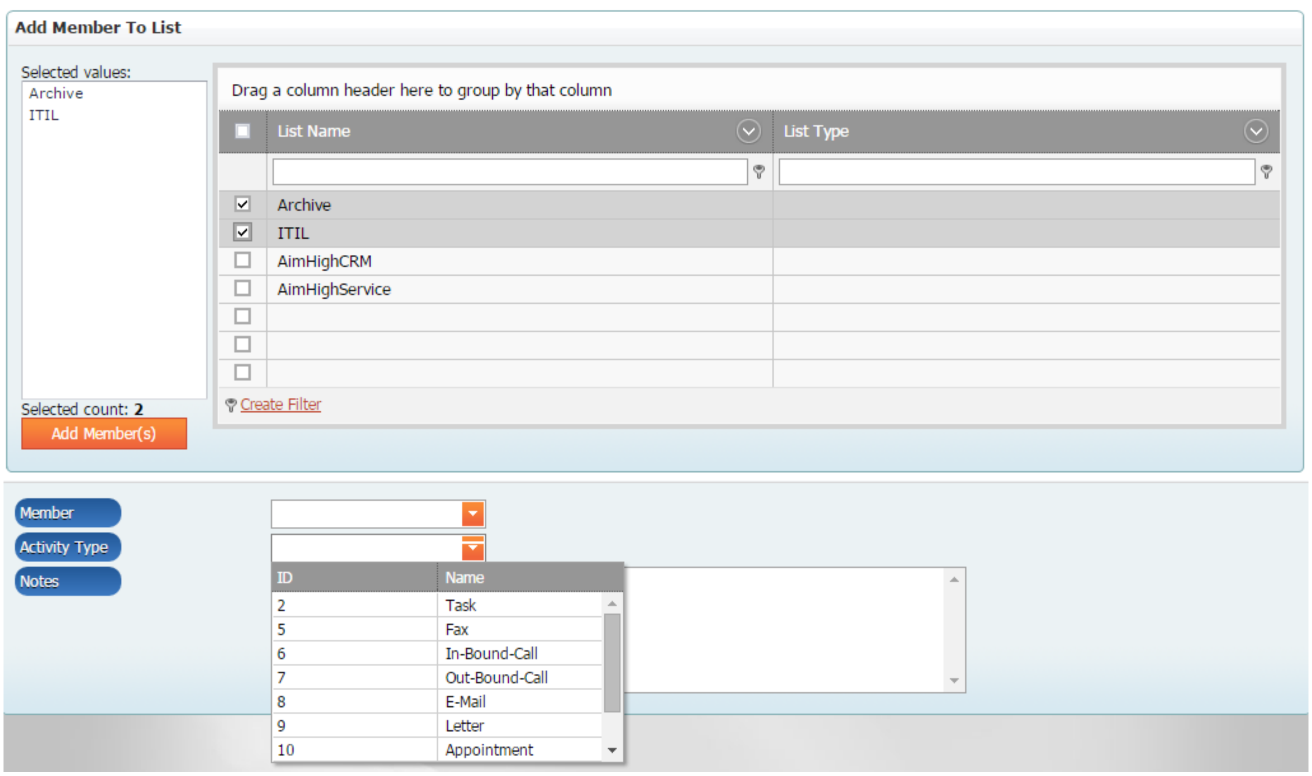
This task requires permissions that are found in all default marketing security roles.

After you create a campaign, add items that are associated with this campaign. You can add a target marketing list and activities.

1- In the Navigation Pane, click **Marketing**, and then click **Campaigns**.

Click the name of the campaign to which you want to add a list or activities, and then do one of the steps in the following table.

| | |
|---|---|
| A marketing list | Under **Campaigns**, click **Marketing Lists**, and then in the **Grid View**, click **Add Existing Marketing List**. |
| Activities | Under **Campaigns**, click **Activities**, and then in the **Grid View**, click **Add Activities**. |



# Work with Marketing Lists

Marketing lists are lists of accounts, contacts, or leads that match a specific set of criteria.

# Create or edit a marketing list

1- In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

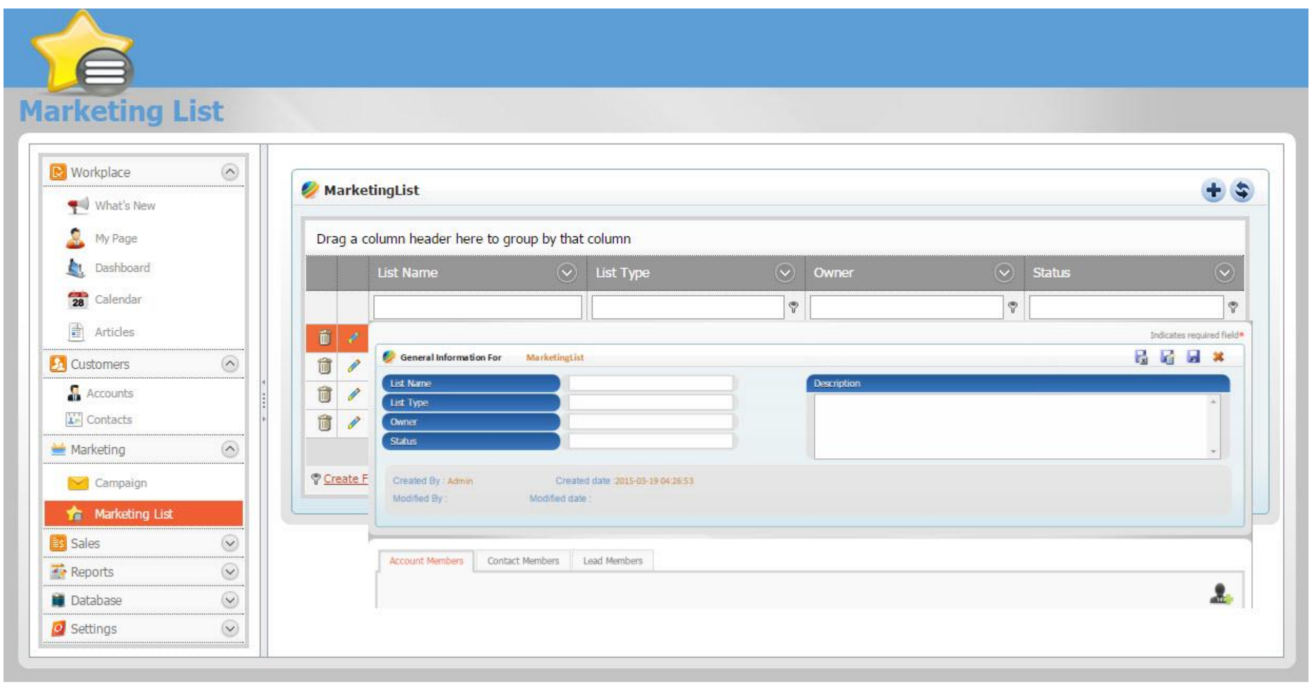
2- In the **Grid View** group, click **New**, or open the marketing list that you want to edit.

3- Under **Information**, specify the information in the following required boxes:

**a- Name**

**b- List Type**

4- Click **Save** or **Save and Close**.




# Notes

After you create an empty marketing list, you must add marketing list members before you can use the list.

# Add members to a marketing list

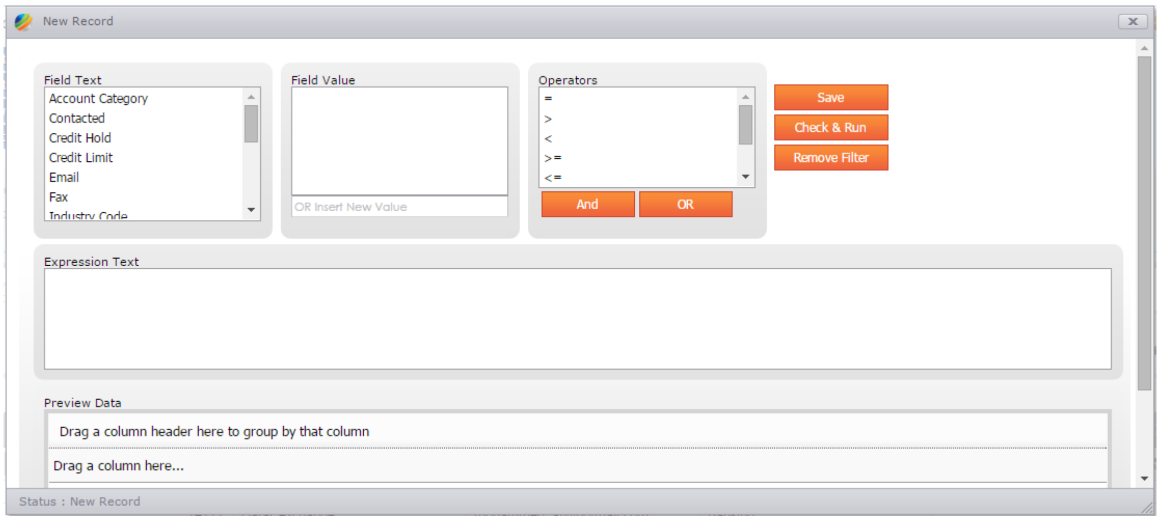
Can I do this task?

This task requires permissions that are found in all default marketing security roles

1- In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

2- Open the marketing list to which you want to add members.

3- Click **Marketing List Members**.




4- Create your query (SQL like) to retrieve data from any of the following : Account – Contact – Lead. The query is dynamic and shall retrieve the new records when opened everytime.

5- Click **Check & Run** to check if this quiry valid or not**,** if valid click **Save**.

# Tip

You can also add members to a marketing list from the Sales area. To do this, in the Navigation Pane, click **Marketing List**, and then click **Accounts**, **Contacts**, or **Leads**. Next, select the records you want to add to a marketing list, and click **Add to Marketing List**. Locate and select the marketing list you want to add the records to and then click **OK.**

## Note

Based on the member type of the list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, any you can add new leads to the member list, but you cannot add accounts or contacts.

# Managing Leads

In AimHigh CRM, you can get lead information in the Sales area. All activities are logged and a running history of every activity with the lead is kept, once it is completed.

You can enter leads individually. In addition, you can use AimHigh CRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Each disqualified lead is retained in the database for business-reporting purposes.

You can track information about prospective customers, and then qualify and assign inquiries. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

## Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

# Work with Leads

Leads represent potential customers who have not yet been qualified by your sales process. As you qualify leads, you can convert them to other types of records.

# Qualify and convert a lead to an account, contact

Can I do this task?

This task requires permissions that are found in all default security roles.

Turning leads into customers, or at least opportunities, is the goal of any organization. After you qualify a lead based on the metrics used by your organization, use AimHigh CRM to create up to three new records quickly in which the lead is represented as an account, contact, or opportunity.

Only one lead at a time can be converted.

1- In the Navigation Pane, click **Sales**, and then click **Leads**.

2- In the list of leads, open the lead you want to qualify and convert.

3- On the **Lead** tab, click **Convert**.

4- In the **Convert Lead** dialog box, **Qualify and convert into the following records** is selected by default. Select one or more of the following:

**Account**

Select this check box to create an account record. Do this if there is an actual company with which you are doing business.

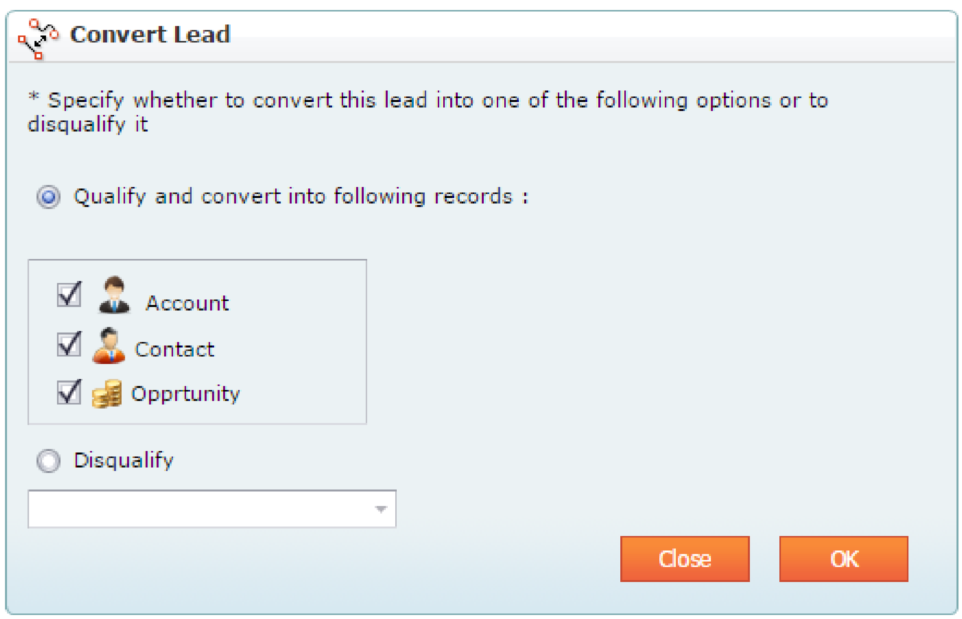
**Contact**

Select this check box to create a contact record. Do this if you are doing business with a specific individual at a company or just an individual customer (consumer).

**Opportunity**

Select this check box to create an opportunity record. If this is the only option you select, then in the **Customer** box, you must associate an account with the lead.

Click **OK**.




# Notes

- Based on the security privileges assigned to your user account, you might not be able to qualify leads that you do not own. If you have to qualify them, you must have the necessary privileges. Also, regardless of who qualifies the lead and performs the conversion, all the newly created records are, by default, owned by the user who owned the original lead.

- Any notes on a lead record do not transfer to the new account, contact, or opportunity record. The notes remain with the originating lead record.
- When you convert a lead, the new record that is created will not be checked to see if it is a duplicate.

# Managing Opportunities

An opportunity is a potential sale, which is similar to a lead. However, the subtle difference is that with an opportunity you can forecast sales revenue, set a potential close date, and factor in a probability for the sale to occur.

# Qualify an opportunity

Can I do this task?

1- In the Navigation Pane, click **Sales**, and then click **opportuinty**.

2- In the list of opportunities, open the opportuinty you want to qualify.

3- In qualify tab, you select a value from the dropdown list to qualify the opportunity, and the equivalent rate is calculated:

a- BUDGET (Do you have budget allocated for this business need)?.

1 = likely to have some budget soon
2 = have some budget, but not sufficient
3 = have budget that may be just right
4 = have sufficient budget

b- AUTHORITY (which of the following best describes your influence on the purchase decision)?

1 = I have no authority, but have direct access to the decision maker(s).
2 = I influence the decisions and have access to the decision maker(s).
3 = I am one of several decision makers.
4 = I have complete authority as the sole decision maker.

c- NEED (do you have current business need for xxx solution)?

1 = likely.
2 = I definitely have the need. This product/project has potential to help.
3 = I definitely have the need. This product is one of several that can help.
4 = I definitely have the need. This is one of the very few products I'm looking at and will help.

d- TIME (what timeframe are you working with to solve this problem)?

1 = 12 months+.
2 = 7-12 Months.
3 = 3-6 months.
4 = 0-3 months.

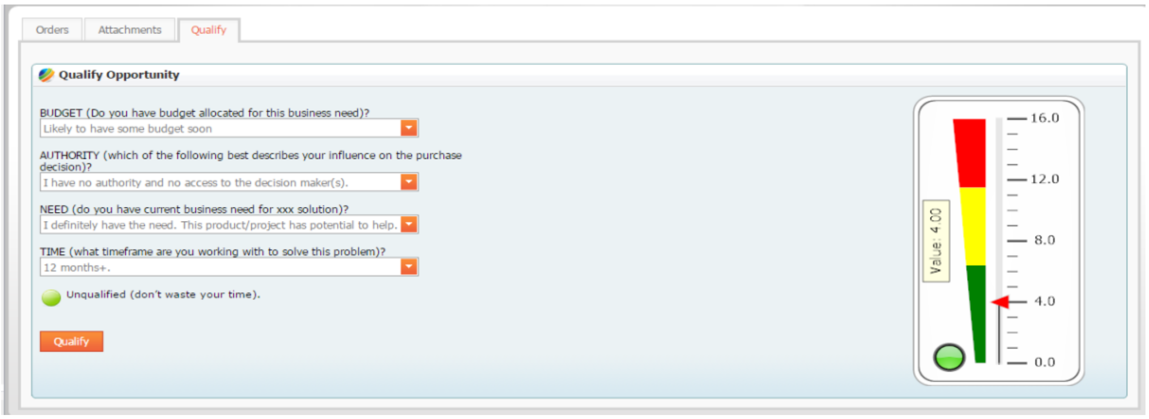
e- Overall Rating will be between 0 to 16

0-4 = Uniqualified (don't waste your time)

5-8 = Slightly Qualified (nurture it)

9-12 = Qualified (Follow up)

13-16 = Highly Qualified (Follow up immediately).



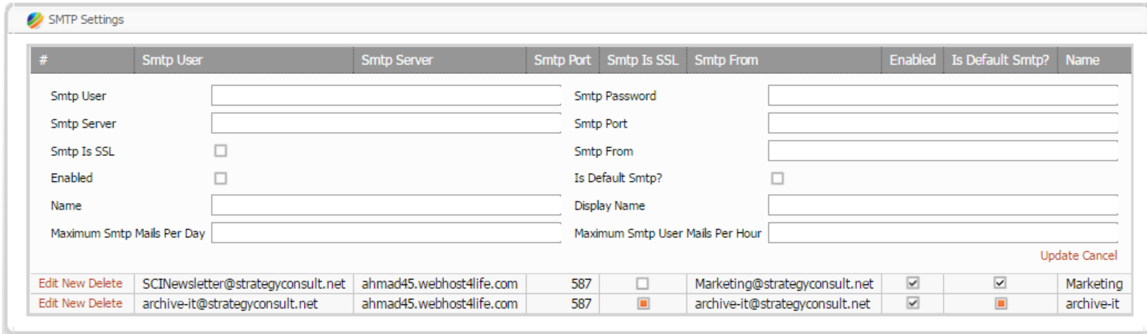

# Work with SMTP

SMTP settings are used to send email messages from marketing campaigns from inside AimHigh CRM

Can I do this task?

This task requires permissions that are found in all default security roles.

1- In the Navigation Pane, click **Settings**, and then click **SMTP**.




You may add multi SMTP account settings to use with campaigns.