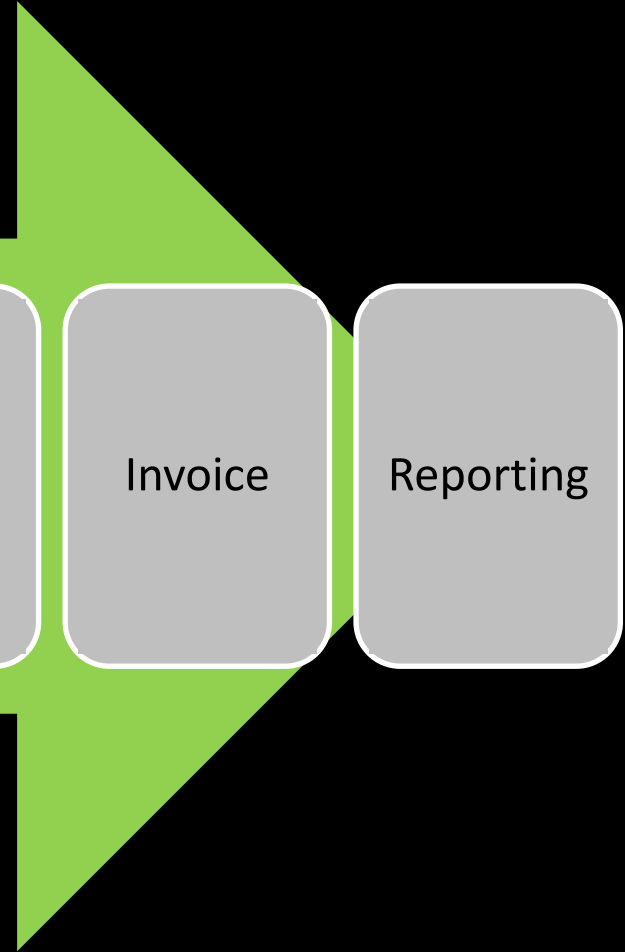


# Corporate Sales



# The Sales Process



Leads

Enquiry

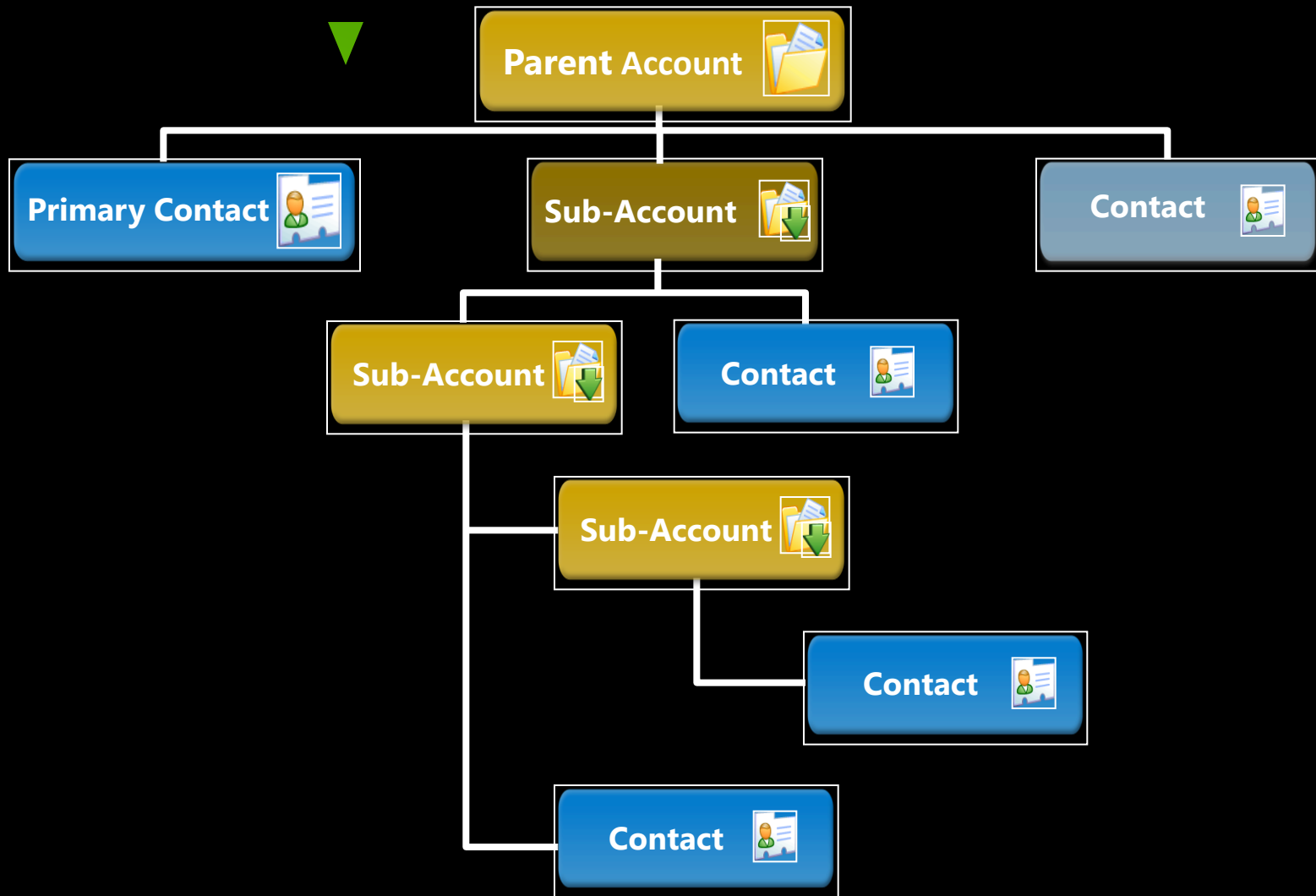
Order

Quote

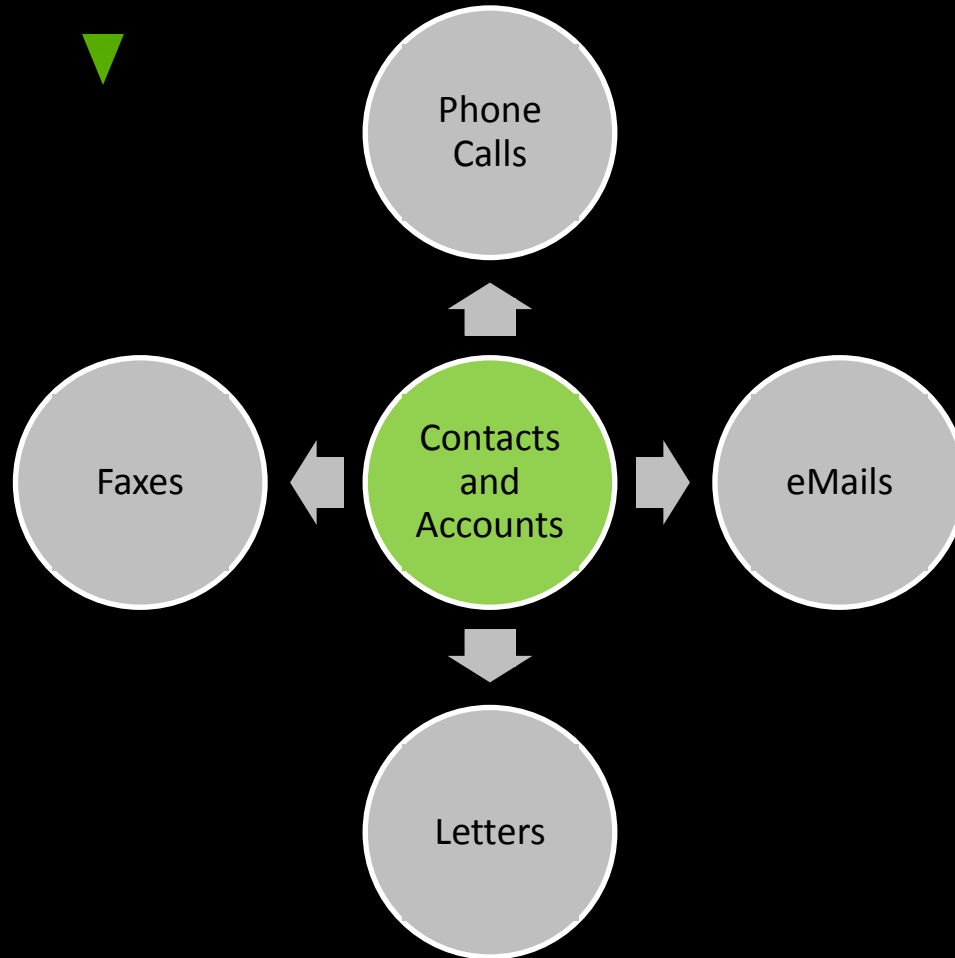
Invoice

Reporting

# Build Account and Contact relationships



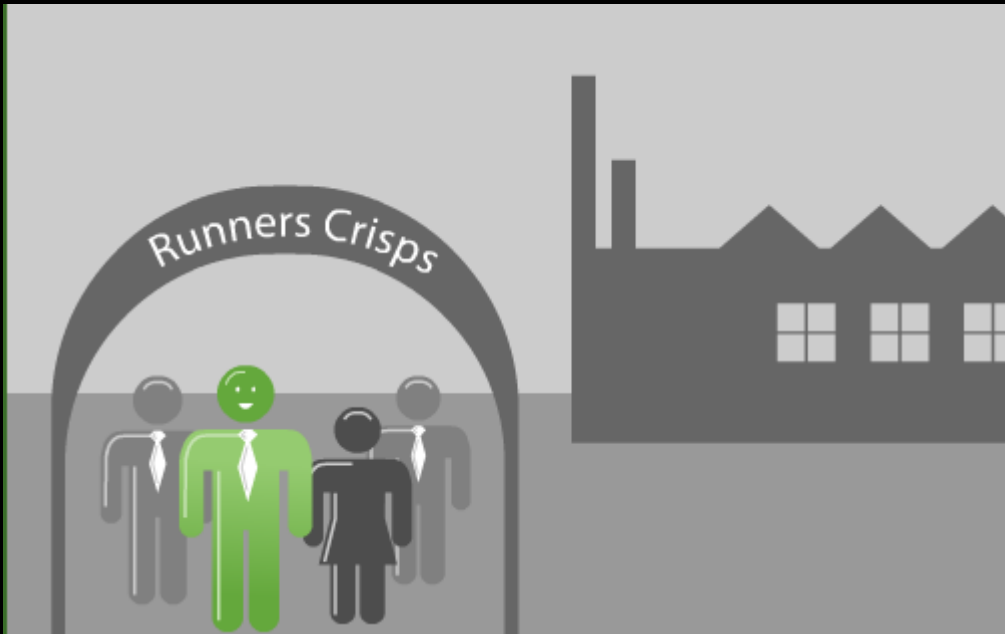
# Record interaction with your customers



# 4 Scenario



- Joe is MD at Runner's Crisps....



The Club matches loyal supporter Joe their corporate database and targets him as a potential prospect for matchday hospitality. He receives the email from G4 Rovers.

If you are having trouble viewing this email, please open the email in your web browser here



[Tickets](#) | [Munster Rugby](#) | [News](#) | [Corporate](#)


Dear Supporter

Please find below information on upcoming Munster Rugby Fixtures and the great value hospitality in Thomond Park Stadium on match day from €25




**2010/2011 Fixture List**  
Click Read More to view all the Munster Rugby fixtures for the upcoming 2010/2011 Magners League and Heineken Cup fixture

[Read More](#)



**Great Value Hospitality in Thomond Park**  
With seven Magners League matches in Thomond Park stadium this season why don't you treat yourself and enjoy the matchday experience in the Thomond Suite, on Level B of the East Stand from €25 per person

[Read More](#)



**Executive Boxes**  
Planning a party, group get together or simply want to enjoy the match in style then a private box on level B of the East Stand is the ideal venue.

[Read More](#)


- » [Send this email to a friend](#)
- » [Update details](#)
- » [Can't view this email properly?](#)
- » [Unsubscribe from this email](#)



**TOYOTA**



This email was sent from:  
Munster Rugby, Musgrave Park  
Cork, Ireland  
Web: [www.munster rugby.ie](http://www.munster rugby.ie)  
Email: [info@munster rugby.ie](mailto:info@munster rugby.ie)

Powered by  Green 4 Solutions

The clickthrough analysis that the club receive after Sending the campaign shows that Joe clicked to 'read more' about an executive box.

The Corporate Sales Team are passed Joe's details as a potential lead for an executive box hire



Inbox - Microsoft Outlook

File Edit View Go Tools Actions CRM Help

New Reply Reply to All Forward Send/Receive Search address books

CRM New Record Track in CRM Advanced Find

**Mail** << **Inbox**

Favorite Folders

- Inbox (25)
- Unread Mail
- Sent Items

Mail Folders

- All Mail Items
- Personal Folders
  - Deleted Items
  - Drafts
  - Inbox (25)**
  - Junk E-mail
  - Outbox
  - RSS Feeds
  - Sent Items
- Search Folders
- Microsoft CRM

Search Inbox

Arranged By: Date Newest on top

Older

Prashanth Desai	7/30/2007	Would like more information on you...
Bruno Denuit	7/30/2007	When is the next off-road adventure?
Stephen Deming	7/30/2007	When is the next off-road adventure?
Bruno Denuit	7/30/2007	When is the next off-road adventure?
Shane DeSeranno	7/30/2007	Would like more information on you...
Shane DeSeranno	7/30/2007	Would like more information on you...
François Ajenstat	7/30/2007	When will the new product line be a...
Anu Deshpande	7/30/2007	Would like more information on you...
Sam Abolrous	7/30/2007	Interested in your company products
Anu Deshpande	7/30/2007	Would like more information on you...
Anu Deshpande	7/30/2007	When will the new product line be a...
François Ajenstat	7/30/2007	Would like more information on you...
Shane DeSeranno	7/30/2007	Would like more information on you...

**Would like more information on your mountain bikes**

Prashanth Desai [sample@microsoft.com]

Sent: Mon 7/30/2007 2:52 PM

To: Administrator, Joseph

I recently was visiting your website became quite interested in your company's products. I would appreciate it if someone from your organization could contact me at their earliest convenience to discuss how I can learn more about Adventure Works O...

CRM is embedded in Outlook, this will track the email in CRM and start the sales process

The sales team has access to all contact records from within their email

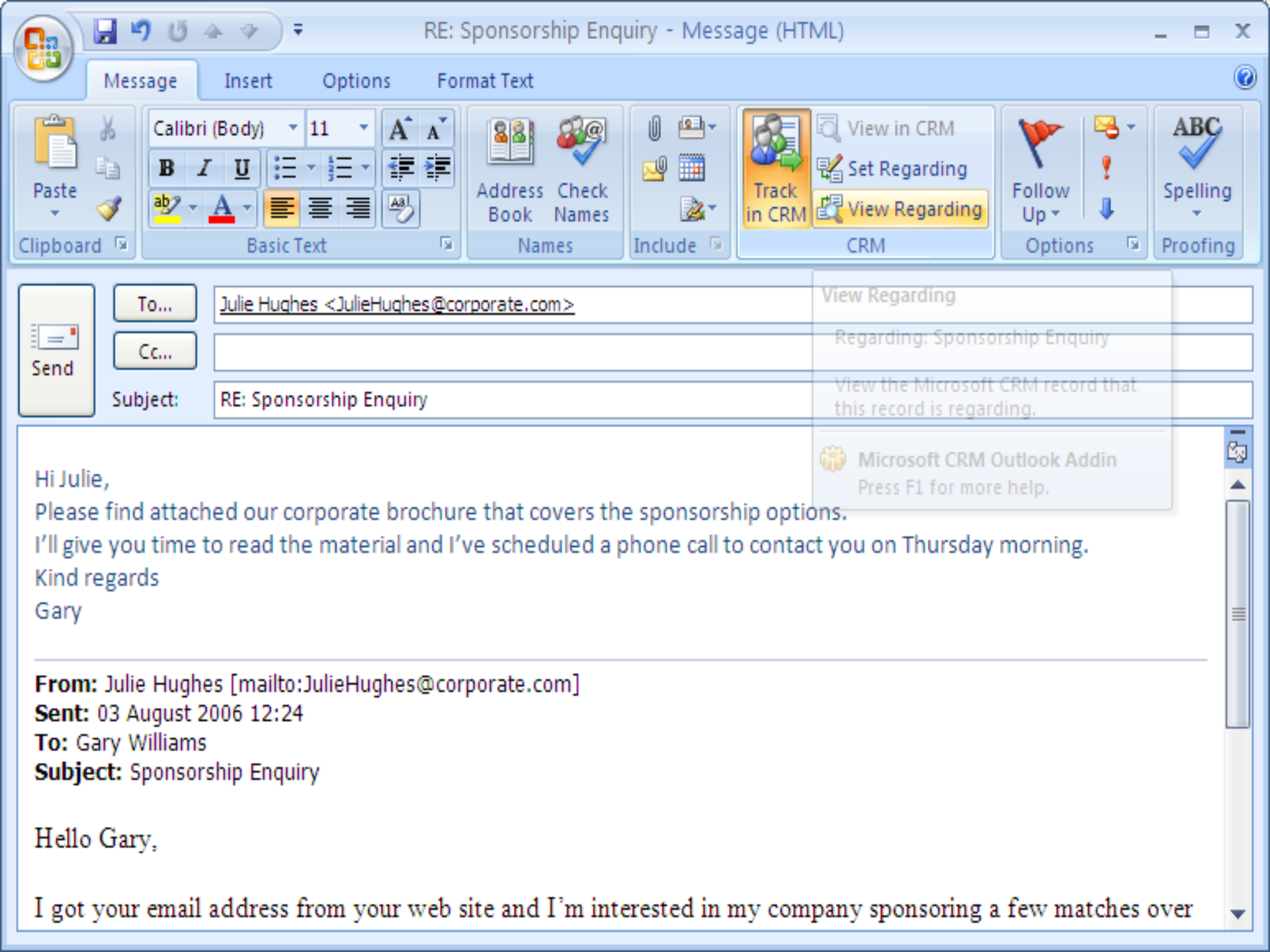
**Select Names: CRM Contacts**

Search:  Name only  More columns **Address Book**

CRM Contacts

Name	E-mail	Company
Adrian Dumitrascu	someone@example.com	
Alan Brewer	someone@example.com	
Alan Waxman	someone@example.com	
Alex Hankin	someone@example.com	
Alex Litton	someone@example.com	
Alice Ciccu	someone@example.com	
Allison Brown	someone@example.com	Basic Bike Company
Alvin Torre	someone@example.com	The Cycle Store
Anders Madsen	someone@example.com	Solid Bike Parts
Anna Bedecs	someone@example.com	Major Sporting Goods
Anna Bedecs	someone@example.com	Best o' Bikes

**Address Book** dropdown menu items:  
CRM Contacts  
Outlook Address Book  
Contacts  
Microsoft CRM Address Book  
CRM Accounts  
CRM Contacts  
CRM Facilities / Equipment  
CRM Leads  
CRM Queues  
CRM Users



Clipboard  
Paste

Basic Text  
Calibri (Body) 11  
B I U  
ab A  
List icons

Names  
Address Book Check Names

Include  
Attachment icons

CRM  
Track in CRM  
View in CRM  
Set Regarding  
View Regarding

Options  
Follow Up

Proofing  
ABC  
Spelling



To...

Julie Hughes <JulieHughes@corporate.com>

Cc...

Subject:

RE: Sponsorship Enquiry

View Regarding  
Regarding: Sponsorship Enquiry  
View the Microsoft CRM record that this record is regarding.  
Microsoft CRM Outlook Addin  
Press F1 for more help.

Hi Julie,  
Please find attached our corporate brochure that covers the sponsorship options.  
I'll give you time to read the material and I've scheduled a phone call to contact you on Thursday morning.  
Kind regards  
Gary

**From:** Julie Hughes [mailto:JulieHughes@corporate.com]  
**Sent:** 03 August 2006 12:24  
**To:** Gary Williams  
**Subject:** Sponsorship Enquiry

Hello Gary,  
I got your email address from your web site and I'm interested in my company sponsoring a few matches over

Paul's PA Julie responds to the email about hospitality and sponsorship opportunities

E-mail: Sponsorship Enquiry - Windows Internet Explorer

File Actions Help

Save and Close Forward Reply Reply All Convert to Opportunity

E-mail: Sponsorship Enquiry

Convert to Opportunity

E-mail Attachments

From Julie Hughes

To Gary Williams Bcc

Subject Sponsorship Enquiry

The e-mail below might contain script or content that is potentially harmful and has been blocked.

Hello Gary,

I got your email address from your web site and I'm interested in my company

Are there set packages available that you could send me information on, or ca

Regarding

Owner Gary Williams

Duration Priority Normal

Due

Category Sub-Category

Status: Received

Done Local intranet 100%

The email is converted into a CRM Enquiry

Enquiry: New

Details:

- Information
- Products
- Relationships
- Sales Process
- Activities
- History
- Sales:
- Quotes
- Bookings
- Invoices
- Competitors

General Administration Notes

Requirement

Potential Customer Price List

Sales Stage Initial Enquiry

Event Details

Match Day No Yes

Event Event Date

Enquiry Type(s) - Please Select At Least One

- |                  |                          |            |                          |
|------------------|--------------------------|------------|--------------------------|
| Hospitality      | <input type="checkbox"/> | Restaurant | <input type="checkbox"/> |
| Conference/Event | <input type="checkbox"/> | Membership | <input type="checkbox"/> |
| Sponsorship      | <input type="checkbox"/> | Other      | <input type="checkbox"/> |

Estimated Revenue

Revenue System Calculated User Provided

Est. Revenue (£) Est. Close Date

Other Details

The CRM enquiry has been modified to store Sports information

Form Assistant

Potential Customer

Look Up Records

Look for: Account

Find

- 032 Design
- 2020 Innovation Group Ltd
- 23 Red Central
- 24 Seven Sameday
- 24 Seven Temp & Perm Pe
- 3 M Health Care Ltd
- 360 Red Productions
- 3G c/o The Business Partn
- 3M UK Plc
- 4C Strategies Limited

Page 1

Tips

This customer will be either the account or contact associated with this enquiry. The Potential

A quote can be produced from the information in the initial enquiry reducing data entry

Quote: Interested in conference facilities - Microsoft Internet Explorer

File Actions Help

Save and Close Follow Up Recalculate Look Up Address... Print in Word

### Quote: Interested in conference facilities

**Details:**

- Information
- Existing Products
- Write-In Products
- Other Contacts
- Activities
- History

General Conference/Event Catering/Bar Addresses Other Details Notes

**Quote ID** QUO-01003-16KY2R **Revision ID** 0

**Name** Interested in conference facilities

**Potential Customer** HSBC **Price List** Price List 2007

**Event Date** 30/06/2007

**Quote Type**

Hospitality	<input type="checkbox"/>	Restaurant	<input type="checkbox"/>
Conference/Event	<input checked="" type="checkbox"/>	Ticket	<input type="checkbox"/>
Sponsorship	<input type="checkbox"/>	Other	<input type="checkbox"/>

**Totals**

Detail Amount (£)	0.00
Quote Discount (%)	
Quote Discount (£)	
Total Tax (£)	0.00
Total Amount (£)	0.00

**Form Assistant**

Potential Customer

Look Up Records

Look for: Account

Find

- 
- 
- " 50 + "
- "I Do" Wedding Consultan
- "X" Postall
- (GE Healthcare)
- .
- .
- .Baylis & Harding
- /the Alton Castle

Page 1

**Tips**

This customer will be either the account or contact associated with this quote. The Potential

Status: Draft

Done Trusted sites



Order Interested in Advertising - Windows Internet Explorer  
http://192.168.0.6:5555/sfa/salesorder/edit.aspx?id={2291560D-1AF3-DB11-A823-0003FFB0A423}

File Actions Help  
Save and Close Follow Up Recalculate Look Up Address... Create Invoice

### Order: Interested in Advertising

General Shipping Addresses Administration Notes

**Order ID** ORD-01014-ZV26DH  
**Name** Interested in Advertising  
**Customer** Brandon Clerly **Price List** Retail

**Totals** **Prices Locked**

Detail Amount (£)	3,583.93
Order Discount (%)	
Order Discount (£)	
Pre-Freight Amount (£)	3,583.93
Freight Amount (£)	
Total Tax (£)	2.00
Total Amount (£)	3,583.93

**Form Assistant**  
Customer  
Look Up Records  
Look for: Account Find  
A nice Deal shoppe  
A. Dabum Corporation  
Active Cycle Mart  
Active Cycling  
Active works  
Advance bicycle Shop  
Advance Cycles  
Alpine Cyde Shop  
Alpine Ski House  
Amazing Bike Company Ltd.

Tips  
This customer will be either the account or contact associated with this order. The Customer

Status: Active  
Done

The order is produced from the information in the original enquiry.

The confirmation form is produced.



## SALES ORDER

Hull Super League Limited  
KC Stadium, Anlaby Road, Hull, HU3 6HU  
01482 327200  
bridie@hullfc.com

04/04/11

To:  
Ben Abbott  
308 Welford Road  
Leicester, LE2 6EG

Sheff Utd

2010-2011

Product ID	Product	Quantity	Price	Sub Total
FOSEP12	Tony Brown Suite Season	1.00	£1,000.00	£1,000.00
			Total Tax	00.00
			<b>Total</b>	<b>£1,000.00</b>

Order completed by	Greg Hancock	Hull FC
Customer authorisation		
Invoice Completed		Hull FC

Save and Close | Follow Up | Recalculate

**Opportunity: Hospitality**  
**Information**

**Details:**

- Information
- Products
- Relationships
- Activities
- History
- Workflows

**Sales:**

- Quotes
- Orders
- Invoices
- Competitors

**General** | Administration | Notes

Topic \* Hospitality

Potential Customer \* [ABC Ltd](#)

Currency \* [Pound Sterling](#)

**Event Details**

Event [Arsenal](#)

**Estimated Revenue**

Revenue [System Calculated](#)

Est. Revenue

Est. Close [9](#)

Des [silver lounge for 10 people](#)

Status: Open






Pipeline Phase: None

**ticketmaster®**

Home | Music | Sport | Arts & Theatre | Family & Attractions

**Football (98) in the United Kingdom**

Refine Your Results:  Football  Show all

Event	Location	Date
 <b>Fulham V Portsmouth - Riverside Restaurant Hospitality Package</b>	Craven Cottage London, GB	Wed 03/02/10 17:30
 <b>Fulham vs. Portsmouth</b>	Craven Cottage London, GB	Wed 03/02/10 20:00
 <b>Barnsley vs. Watford</b>	Oakwell Stadium Barnsley, GB	Sat 06/02/10 15:00
 <b>Manchester United vs. Portsmouth</b>	Old Trafford Manchester, GB	Sat 06/02/10 15:00
 <b>Plymouth Argyle vs. West Bromwich Albion</b>	Home Park Stadium Plymouth, GB	Sat 06/02/10 15:00

**Categories**

- All Sport (321)
- Athletics (9)
- Basketball (10)
- Boxing (6)
- Cricket (9)
- Cycling (3)
- Equestrian (6)
- Football (98)**
- GAA (0)
- Golf (13)
- Gymnastics (0)
- Hockey (0)
- Horse Racing (3)
- Ice Hockey (14)
- Martial Arts (7)
- Motorsports (1)
- Rugby League (0)
- Rugby Union (49)
- Tennis/Squash (6)
- Wrestling (44)
- More Sport (43)

Tickets are purchased through an optional link to the ticketing system.

An Invoice is produced and the details passed to finance through an optional integration with their finance package (e.g. SAGE, Dynamics GP)

https://g4sdemo.green4crm.com/?id={8438CB9A-9E5E-E011-84B5-000000000000} - Invoice: hospitality - Windows Internet Explorer

Save and Close | Follow Up | Reports | Recalculate | Look Up Address... | Cancel Invoice... | Actions | Help

### Invoice: hospitality for Hull game

#### Information

Details: Information | Existing Products | Write-In Products | Other Contacts | Activities | History | Workflows

General | Shipping | Addresses | Administration | Notes

Invoice ID \* INV-01004-74PP86

Name \* hospitality for Hull game

Customer \* Ben Abbott | Currency \* Pound Sterling

Price List \* Season

#### Totals

Detail Amount	£ 1,000.00	Prices Locked *	<input checked="" type="checkbox"/>
Invoice Discount (%)			
Invoice Discount	£		
Pre-Freight Amount	£ 1,000.00		
Freight Amount	£		
Total Tax	£ 0.00		
Total Amount	£ 1,000.00		

Form Assistant: Form Assistant Help | Form Assistant Help | Select a lookup field.

Status: Active

Trusted sites | Protected Mode: Off | 100%



## Sales Management & Reporting



# Report Viewer: Sales Pipeline

Edit Filter

Group By Sales Process Sales Process

Group By Date

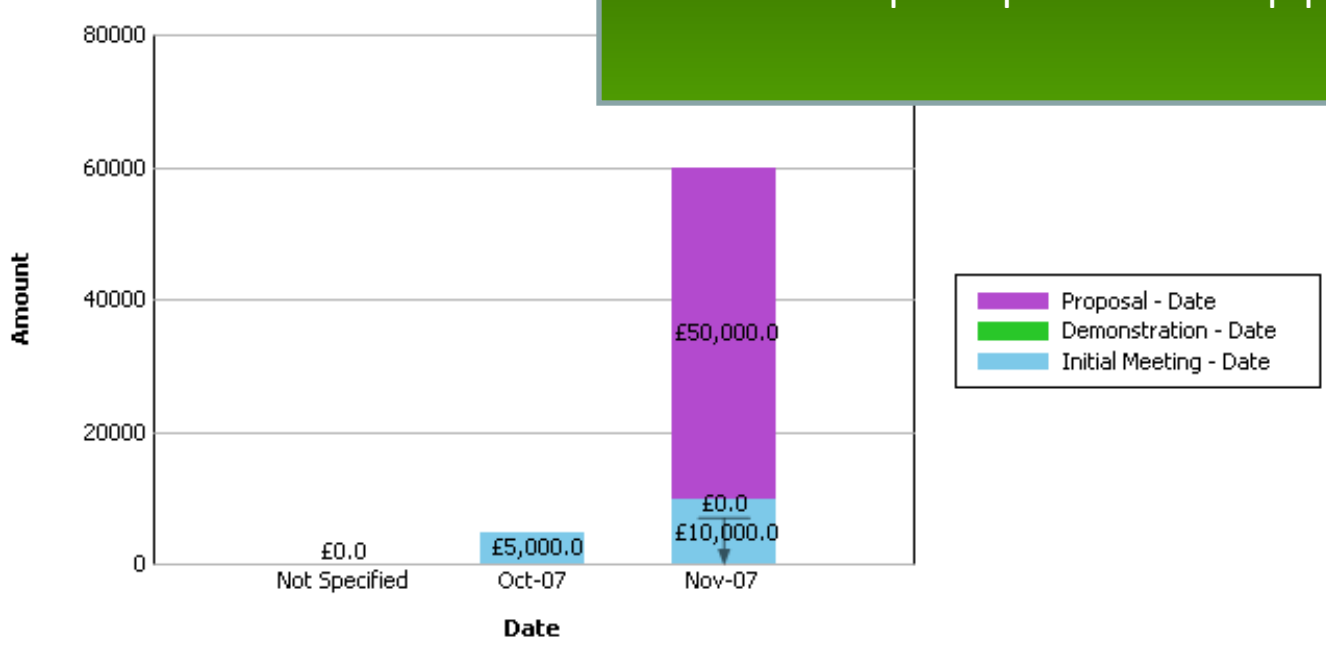
View Report

Revenue Estimated Revenue

1 of 1 100% Find | Next Select a format Export

## Pipeline

Powerful reports provide sales pipeline and forecasting



Microsoft CRM 3.0 - Windows Internet Explorer

http://crm/loader.aspx

File New Go To Tools Help

New Record Advanced Find

Workplace Activities

Look for: Find Date: All Type: All

Subject	Regarding	Activity Type	Activity Status	Owner	Priority
That your interest (We...	John Williams	E-mail	Completed	CRM Admin	Normal
See you John Williams	John Williams	Task	Open	CRM Admin	Normal
Call to John Will...	John Williams	Task	Open	CRM Admin	Normal
... expensive r...	Connie Coffman	E-mail	Open	Jose Curry	High
... seminar ...	Charity event to s...				
... are parts					
... they are interes...	Charity event to s...				
... the new produ...	Product launch ca...				
... est price list					
... 10 ...ing bikes.	Hung-Fu Ting				
... your replacement...					
... rs in the lot of ...	Cracked derailleur...				
... y frames	Ronald Adina				
... rest.	Charity event to s...				
... they are interes...	Charity event to s...				
... e from Scooters ...	Product launch ca...				
... tributors - tourin...	Touring Bike Quote				
... 4 ...	Cindy Dodd				
... and Mountain...	Megan Davis				
... card back for ...	Scott Bishop	E-mail	Open	Alan Jackson	High
... your replacement...	Road-250 derailleur...	E-mail	Open	Roger Van Houten	High
... cycles quote for ...	Road-550-W quote	E-mail	Open	Gail Erickson	High
... On ... this year.	John Colon	E-mail	Open	Gail Erickson	High
... give-away mar...	Alan Brewer	E-mail	Open	Jose Curry	High
... this summer	10 Touring Bikes L...	E-mail	Open	Jose Curry	High
... on touring fram...	Jay Adams	E-mail	Open	Alan Jackson	High
... low price max...	Product launch ca...	Campaign Resp...	Completed	Patricia San Juan	Normal
		E-mail	Open	Alan Jackson	High
		E-mail	Open	Alan Jackson	High
		Campaign Resp...	Open	Patricia San Juan	Normal

Export Data to Excel -- Webpage Dialog

Select the type of worksheet to export.

Use this type of worksheet:

- Static worksheet with records from this page
- Static worksheet with records from all pages in the current view
- [Dynamic PivotTable]
  - Select Columns
  - Edit Columns
- Dynamic worksheet

Export Cancel

All\_Activities[1].xls - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles

G30

Count of (activityid)	Activity Type				
Owner	Appointment	E-mail	Phone Call	Task	Grand Total
Alan Jackson			10	4	41
Ben Burton		1		2	5
Connie Watson			2	3	8
CRM Admin	1	1			4
Gail Erickson			5	14	23
Jose Curry		3	6	15	50
Mathew Pereira				1	2
Patricia San Juan			3		6
Roger Van Houten		3		11	26
Ryan Williams		3		3	6
Stefan Delmarco					2
Grand Total		4	34	53	163

Click the Excel button from any grid will export the data to Microsoft Excel

In only a few minutes you can generate a weekly activity analysis of all team members.

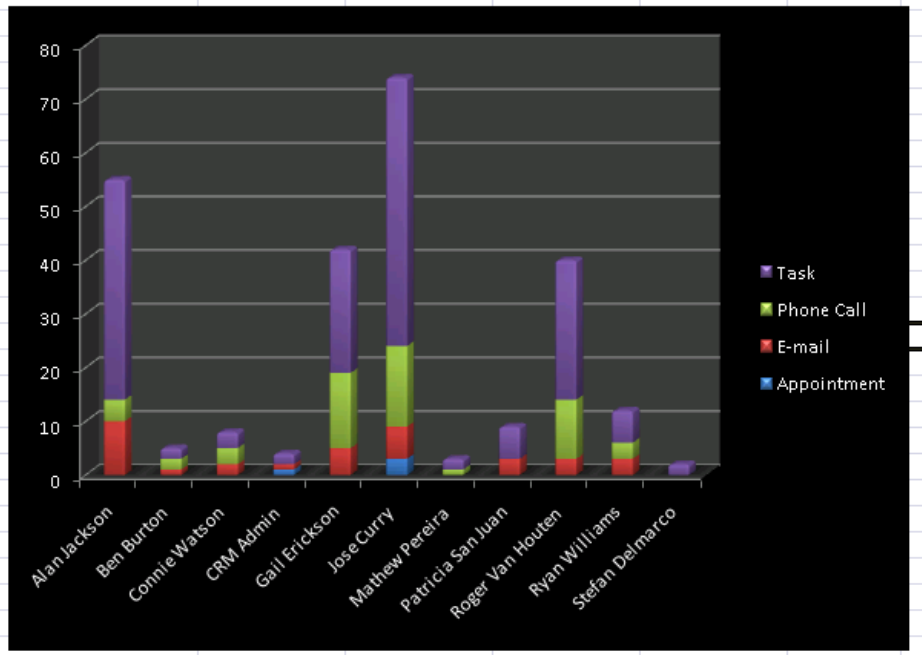


Chart 1

	A	B	C	D	E	F
3	Sum of Actual Revenue		Sales Stage			
4	Years	Created On	Demonstration	Final Negotiation	Future Opportunity	Initial Meet
5	2006	Oct				
6		Dec				
7	2007	Jan	0		5400	0
8		Feb		975		18150
9		Mar	0			600
10		Jul	7200			
11		Aug				0
12		Sep	7800			800

### PivotTable Field List

Choose fields to add to report:

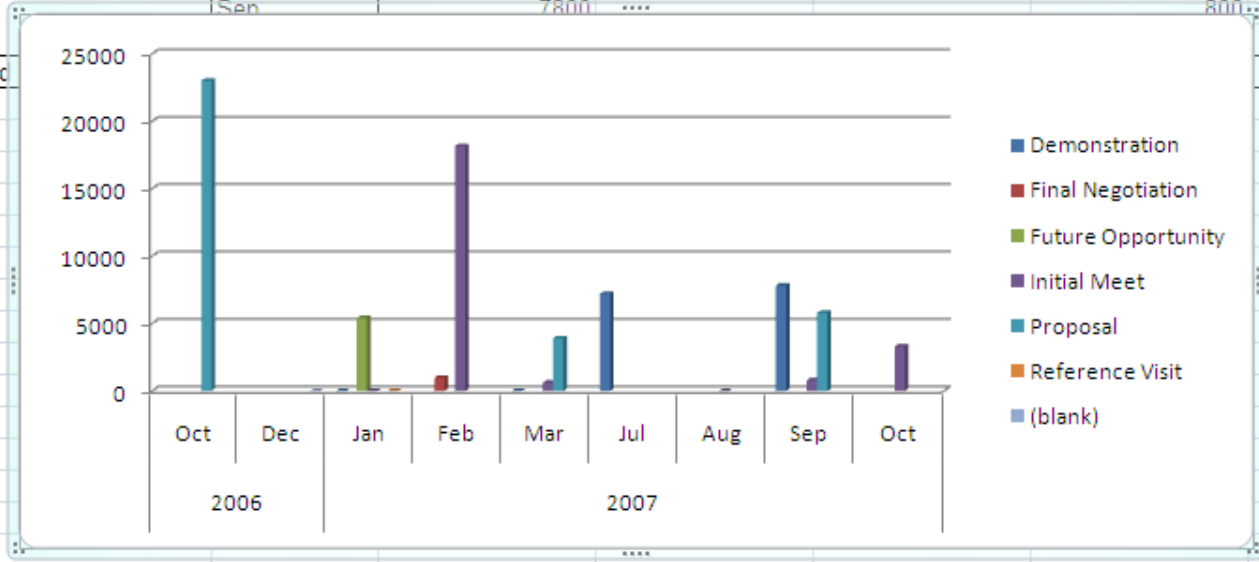
- (opportunityid)
- Actual Close Date
- Actual Revenue
- Created On
- Potential Customer
- Revenue
- Sales Stage
- Status
- Topic
- Years

Drag fields between areas below:

Report Filter:   
 Legend Fields: Sales Stage






Axis Fields (Categories): Years, Created On   
 Values: Sum of Actual Revenue

Defer Layout Update Update



# Summary

## Sales Process

-  Improve efficiency
-  Make use of valuable data
-  Record customer purchases
-  Automate tasks through Workflow
-  Build dashboards visually showing KPIs

