

Managing leads through the Arrow ECS Sales Lead Portal



Helping you track your opportunities

We know you have a business to run, so the SLP makes updating and reporting on the leads you receive as quick and easy as possible.

Launched a few years ago, the SLP replaced numerous spreadsheets with a single location for managing opportunities. The SLP gives all Arrow ECS' channel partners who have run a campaign a personalised view of all their leads, across their relevant vendors.

We will also listen to your feedback and continually aim to improve it to make it even easier to find the information you need, and to report back to us.

Getting started: accepting or rejecting a lead

Whenever we have a good quality lead for you, you'll receive an email alert from arrowecsleads@cpbuk.co.uk, with the subject line 'Arrow ECS Sales Lead'.

You will be prompted to follow a link to the SLP, where you have a choice: accept or decline the lead, which will be highlighted in red. If a lead is not appropriate for your business, when rejecting the lead please notify us with the reason why. This is really important to us so we can learn more about your lead requirements and tailor the campaign if needed.

Whatever you decide, please take action promptly to ensure that the prospect receives a professional response. For this reason, we will reallocate your lead(s) to another channel partner if you haven't responded within 30 days.

If you choose to accept a lead, you should then revisit the SLP regularly to update your allocated leads. This way, we can feed back to the vendors on your progress – hopefully your eventual success – and also provide you with support along the way should you require a quotation or organise a customer demonstration of a solution.

Logging on

You can visit www.arrowecsleads.co.uk at any time and from any internet browser. Please enter your username (normally your email address) and password. Click on 'Login' to enter the Sales Lead Portal.

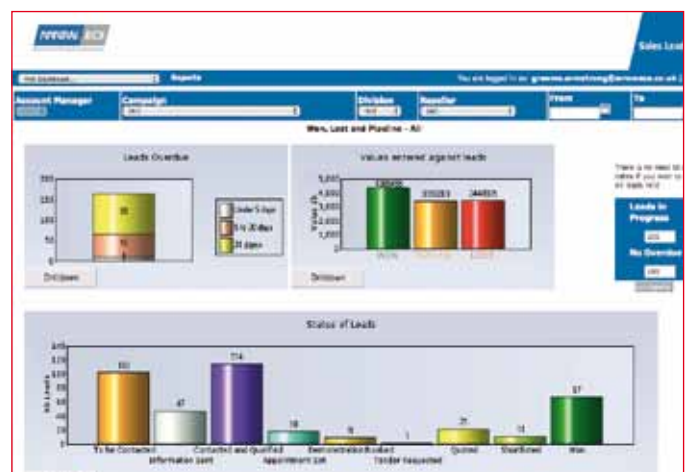
If you are missing any login details or have any other enquiries, please contact the Arrow ECS SLP helpline on 01295 274 075 or email arrowecsleads@cpbuk.co.uk

A quick overview through the dashboard

Navigating the SLP couldn't be easier. The dashboard homepage gives an instant snapshot of the status of all your leads. Through three bar charts, it shows at a glance:

- How many leads are overdue, and by how many days
- How many £k are in your pipeline
- A breakdown of the live leads allocated to you along with their status – from first contact to winning the business (see 'Lead status' on the following pages for a full listing of all the categories)

You can access a list of the leads in any of the given categories by clicking on any of the bars within the charts.



The complete picture on all live leads

To see a list of your leads, either click on the 'view all leads' link or on any of the coloured bars from your dashboard. A handy hint to know is that you can sort the leads by clicking on any of the column headers. To sort them automatically click twice on the pipeline value, this will bring the highest value to the top so you can prioritise your follow up. Around 20 leads can be viewed on one screen. If more leads are allocated to you, please use the 'Go to page...' option towards the bottom left of the screen then select the page from the drop down menu.

To display the full information around the lead, click on a company name or on the 'View' button towards the end of each line, next to the 'Note' button. If you haven't accepted or rejected a lead yet, you will be prompted to do so at this point. You can view detailed information, such as:

- The prospect's current IT set-up and the solution they require
- The budget and who has sign-off
- Any competitive activity
- Any roadblocks to moving the deal forwards
- Timescales and next steps

You can also export the data to your own applications as a PDF, or print it out, to make it easier to discuss with your team. Just click on the appropriate button at the top or bottom of the lead notes.

To go back to the list of leads at any time, simply click the 'Back to leads' button, which is again located at the top and bottom of the lead notes.

You can also return to the dashboard view at any point by clicking on the 'View dashboard' button near the top left of the screen.

Easily update your leads

Once a lead has been accepted, you must update it regularly through the 'View all leads' screen. This takes just seconds.

There are three key areas that need to be kept up-to-date:

- **Lead status:** Update the lead status by selecting an appropriate status from the drop-down choice. Once a lead is set to a non-live status either Lost or Dead, it will automatically be removed from your view.
- **Value:** Please enter the pound sterling value of the opportunity in this field without any pound sign or comma (e.g. 10500.50). Wherever possible please enter the value of the sale to Arrow ECS. If this is not known, then enter the total value of the whole sale.
- **Next Action:** Please update the next action date to reflect how you see the deal going forward, for example, when you plan to meet next or the date you expect to get a decision. This date can be changed by clicking on the calendar icon and selecting the appropriate date with the cursor. The first 'Next action' date will be set when the lead is first published to you.

Always remember to save your changes!

To help you to keep on track, you'll be sent automatic email reminders if leads are overdue for an update.

Add critical information

There is also a free text 'Note' field that can be used to add and share any additional information for each lead, so that:

- In-house, your colleagues have access to any significant background information in your absence
- We can understand any issues and provide additional support
- The information can be sent to the vendors to help build their competitive intelligence

To access the free text note field, click on the 'Note' box to the right hand side of the 'View' option. If there is any information already in the 'Note' field, the box will be green. If it is empty, the box will remain blue.

Arrow ECS campaign managers will also actively canvas information from you on deals won and lost and can work with you on leads that are close to quoting or closure.

Any questions?

If you would like to discuss how your business could benefit from Arrow ECS marketing support, please contact your Account Manager, email marketing@arrowecs.co.uk or call **0800 983 2525**

For help with day-to-day use of the SLP, please contact CPB UK Ltd, who maintain and manage the SLP on our behalf. Please call **01295 274 075** or email arrowecsleads@cpbuk.co.uk

