# Nextiva CRM
# Leads & Opportunities

VERSION 2

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# Nextiva CRM: Leads and Opportunities

Nextiva's Customer Relationship Management tool (CRM) enhances customer relationships by tracking the customer journey from recruitment to cancelation. Nextiva CRM improves business productivity, customer sentiment, profitability, and communication processes all within one system, increasing customer loyalty and retention.

For sales teams and business development reps, pipeline analytics are key to measuring growth or decline, which is essential to any organization. Whether you prefer using visual views (Board/Kanban view) or tracking using searchable lists of prospects, Nextiva CRM Leads and Opportunities will elevate your team to save time and energy.

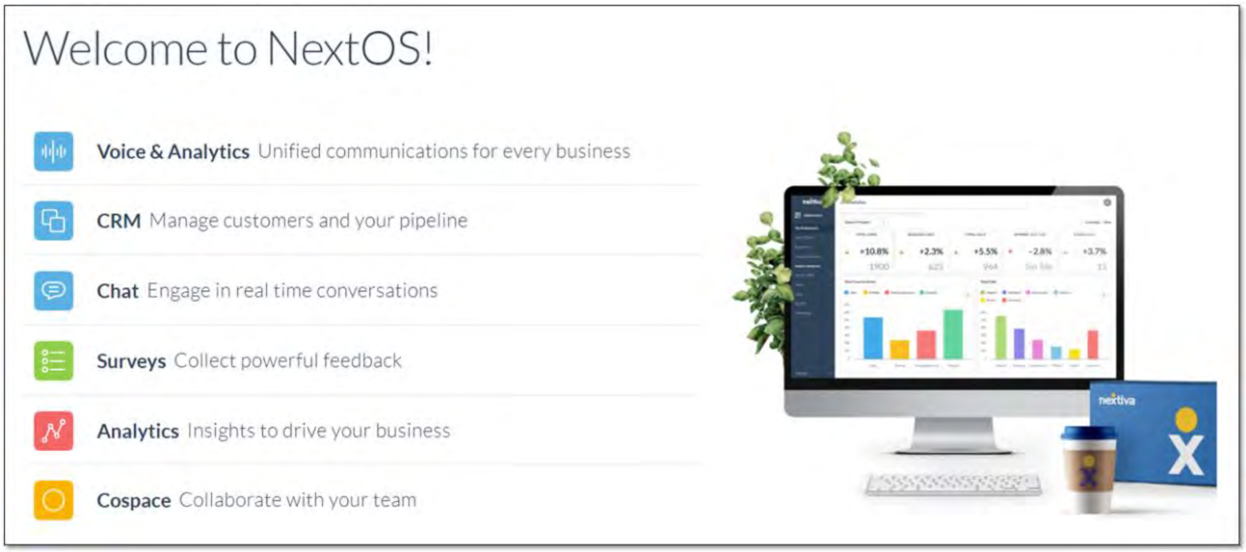
> **TIP:** Start utilizing our default or custom stages for Opportunities, then implement Nextiva CRM Automation to create outbound communication with prospects throughout recruitment.

Use Nextiva CRM Leads and Opportunities to:

- Identify sales prospects.
- Convert Leads to Opportunities to accurately track pipelines.
- Utilize Opportunity stages based on your company needs.
- View sales analytics and customer insight.
- Communicate via CRM.

# Logging In

1. Visit www.nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.



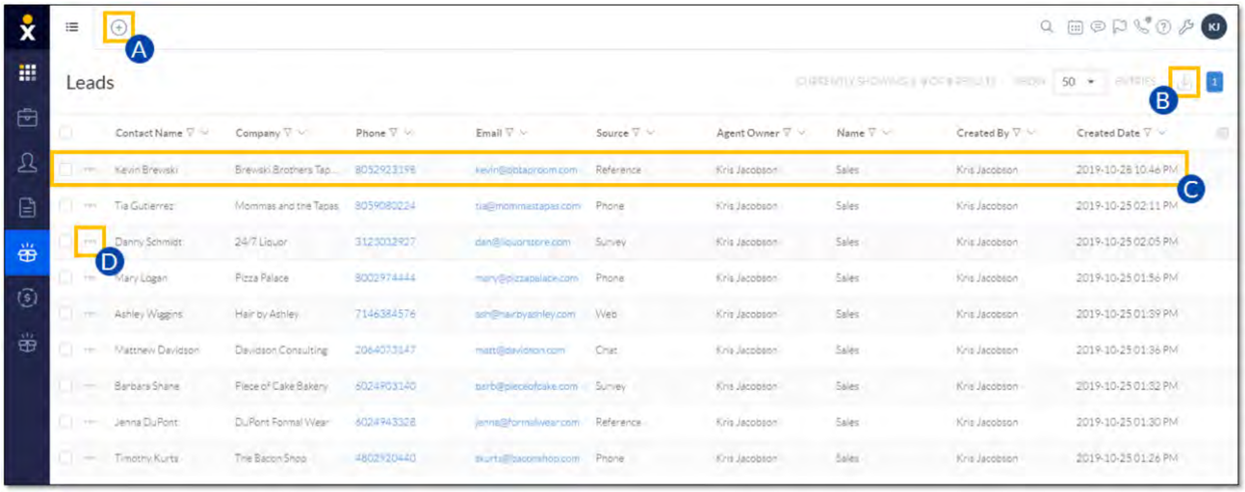

*NextOS Home Page*

# Leads

**Leads** in Nextiva CRM help sales agents and managers manage and qualify potential prospects and access key performance indicators at the speed of light.

Creating Leads is the first official stage of the sales life cycle. Often a “discovery” call occurs during this stage to determine whether the Lead is real and interested.

Click **Lead** from the left panel to view all Lead records in Nextiva CRM.



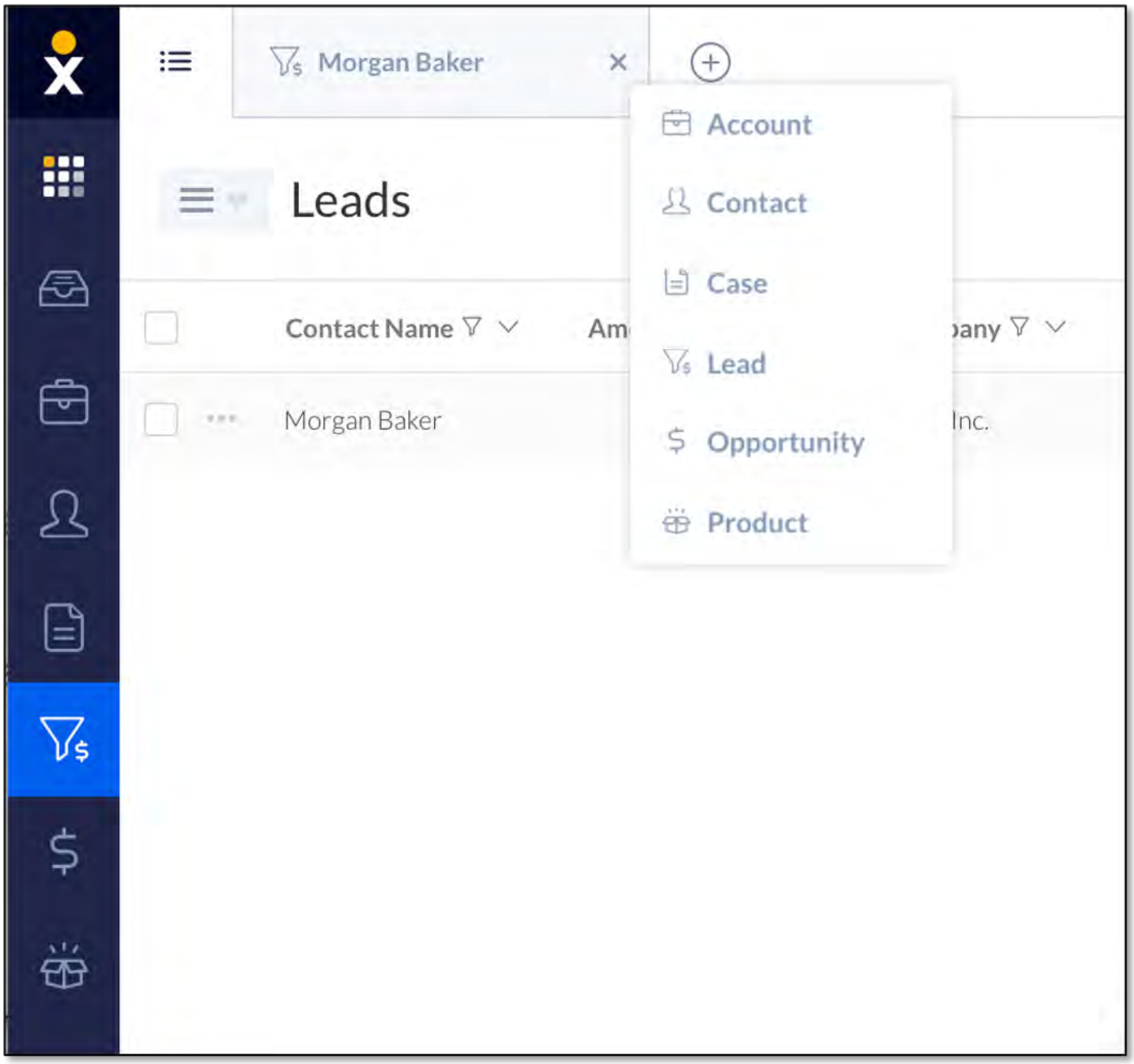

*Lead View*

Users can perform the following actions in Lead view:

A. **Add New:** Click the **Plus (+)** icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.
B. **Export Leads:** Select the checkbox next to any Lead and click **Export** to create a **.csv** file.
C. **View Lead Details:** Click the Lead for more information.
D. **More Options:** Click the **Ellipsis (...)** next to a Lead to **Watch**, **Open in Background**, and **Delete**. **Watch** allows you to receive alerts if the Lead is changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.

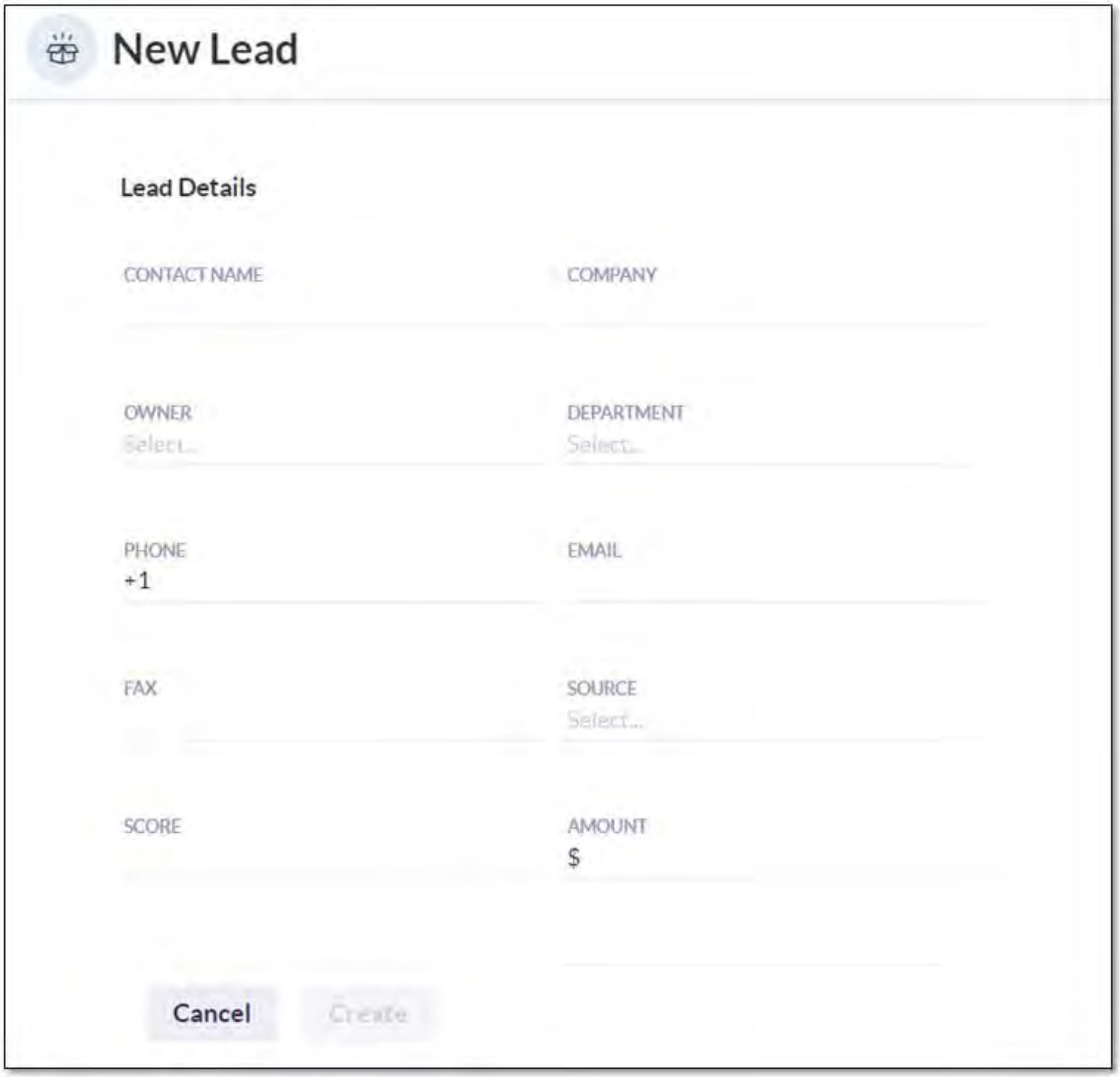
## Creating Leads

1. Click the **Plus (+)** icon and select **Lead.**




*Lead Option*

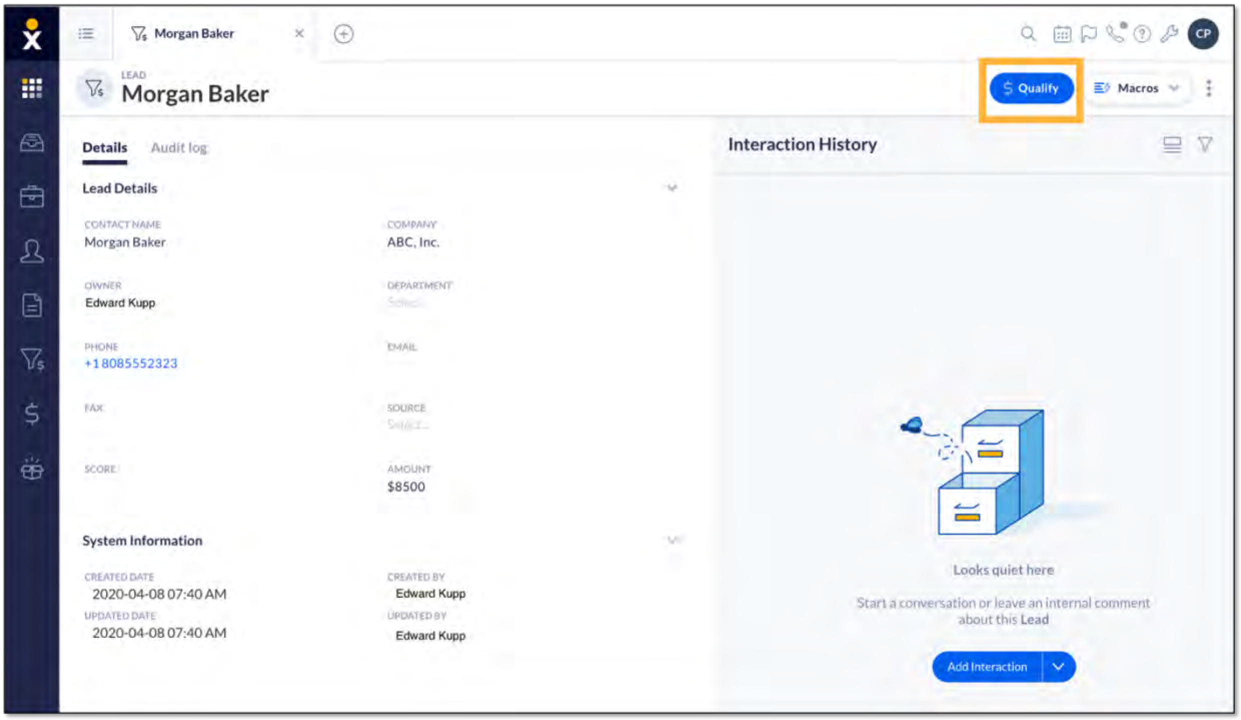
2. Complete the **New Lead** form. Click **Create**.




*New Lead Form*

## Lead Workspace

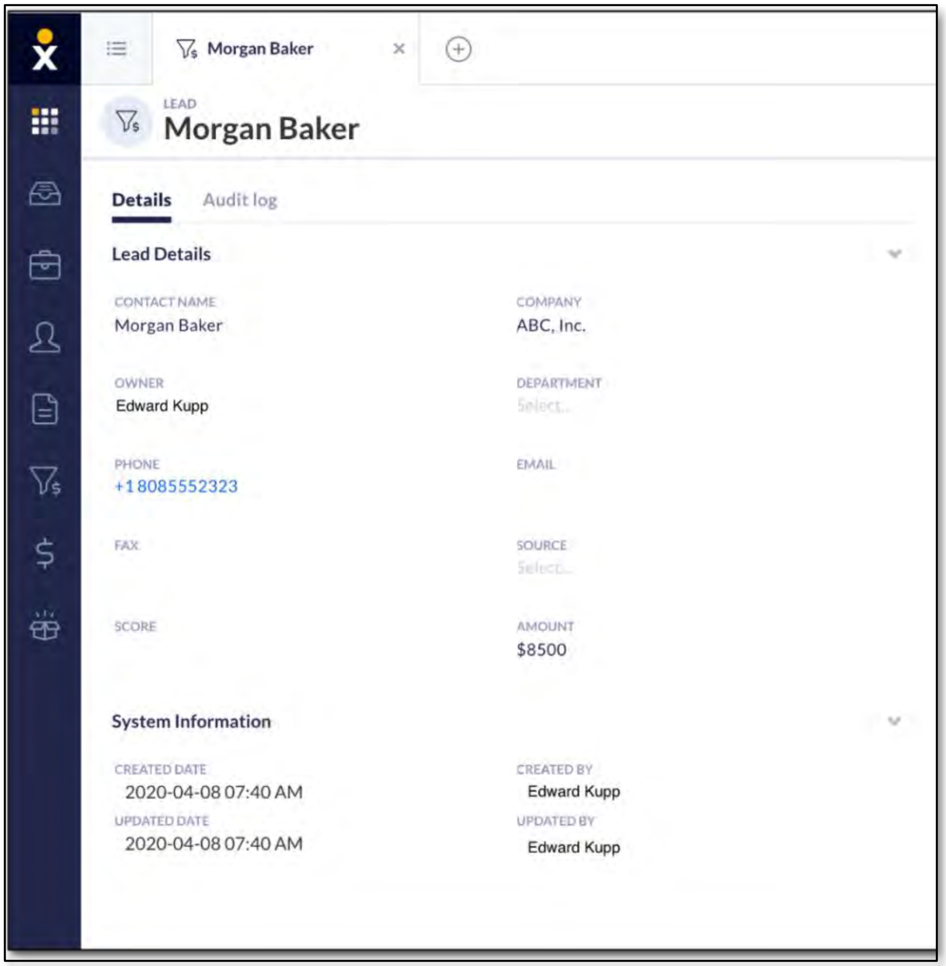
Click on any Lead to view all details. In the Lead Workspace view you can see and edit Lead details, send emails, add notes, and qualify the Lead to an Opportunity.




*Lead Workspace*

## Details Tab

Within the **Details** tab view and edit the Lead information, such as the contact name, company, phone number, email, and more.

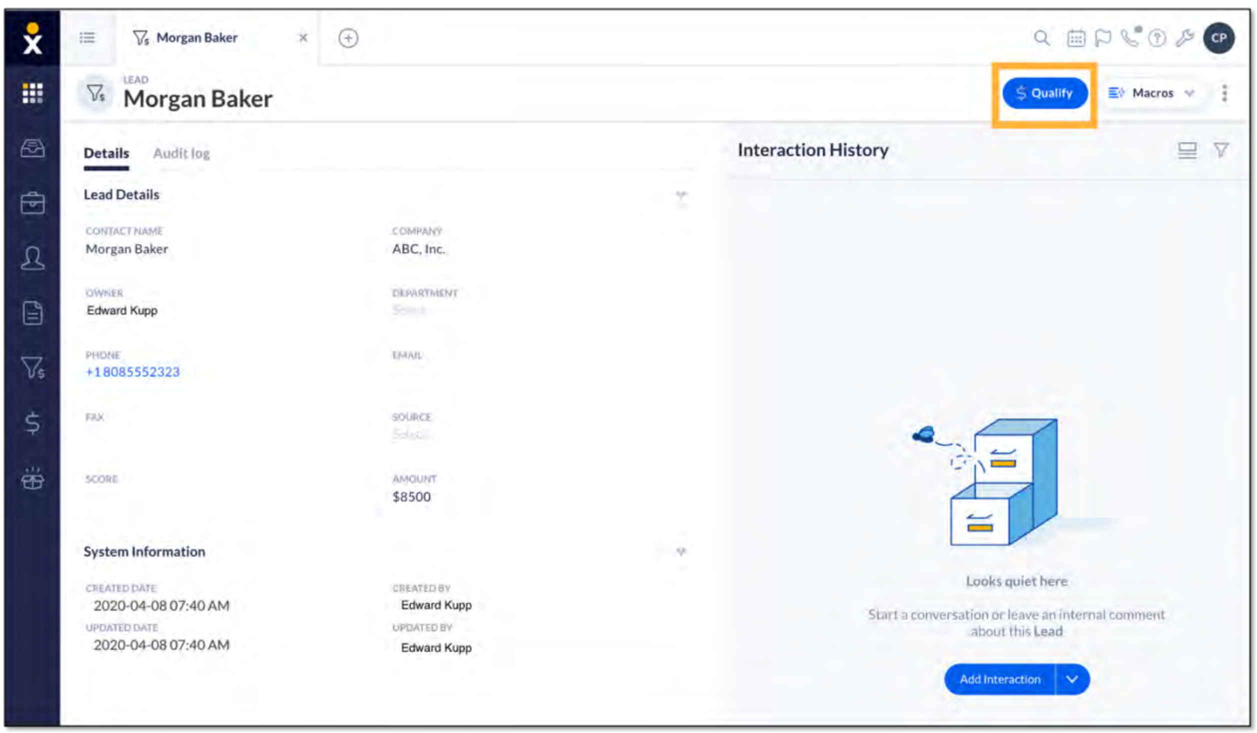



*Details Tab*

## Qualify a Lead

When a prospective customer has more than a 10%  chance of becoming a sale (or whatever likelihood you choose), it's time to qualify the Lead and convert it to the Opportunity stage. Sales associates and managers can easily track Leads and prospects through all stages of the sales life cycle under Opportunities in Nextiva CRM.

Qualify Leads to Opportunities by clicking the **Qualify** button on the top-right corner. Once a Lead has been qualified to an Opportunity, it cannot be moved back to the Lead stage.

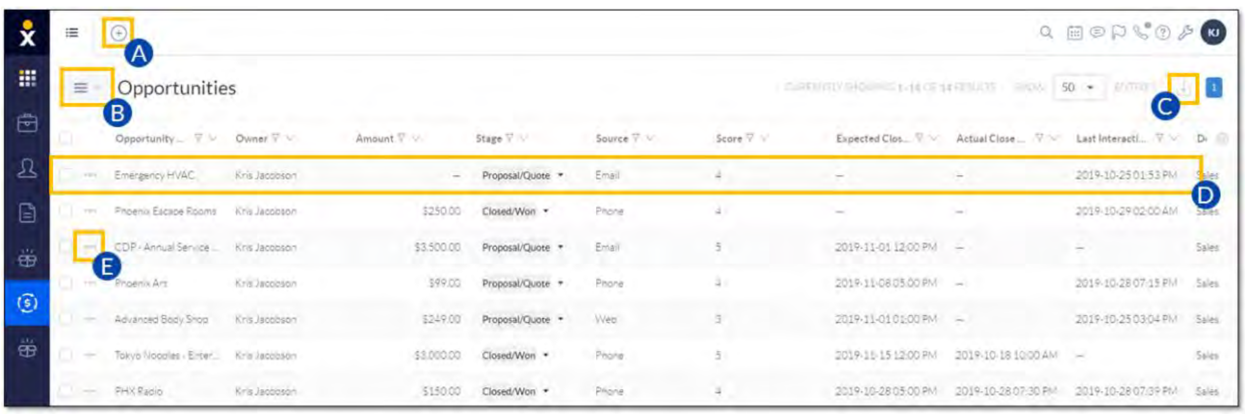



*Qualify Button*

## Opportunities

Accurately tracking potential sales is vital to a company's success**.** Not only can you manage each stage of the sales life cycle simply and professionally, but by associating your specific Products and pricing to CRM, the system will automatically calculate the value of the Opportunity too.

Click **Opportunity** from the left panel to view all Opportunity records in Nextiva CRM.




*Opportunity View*

Users can perform the following actions in Opportunity view:

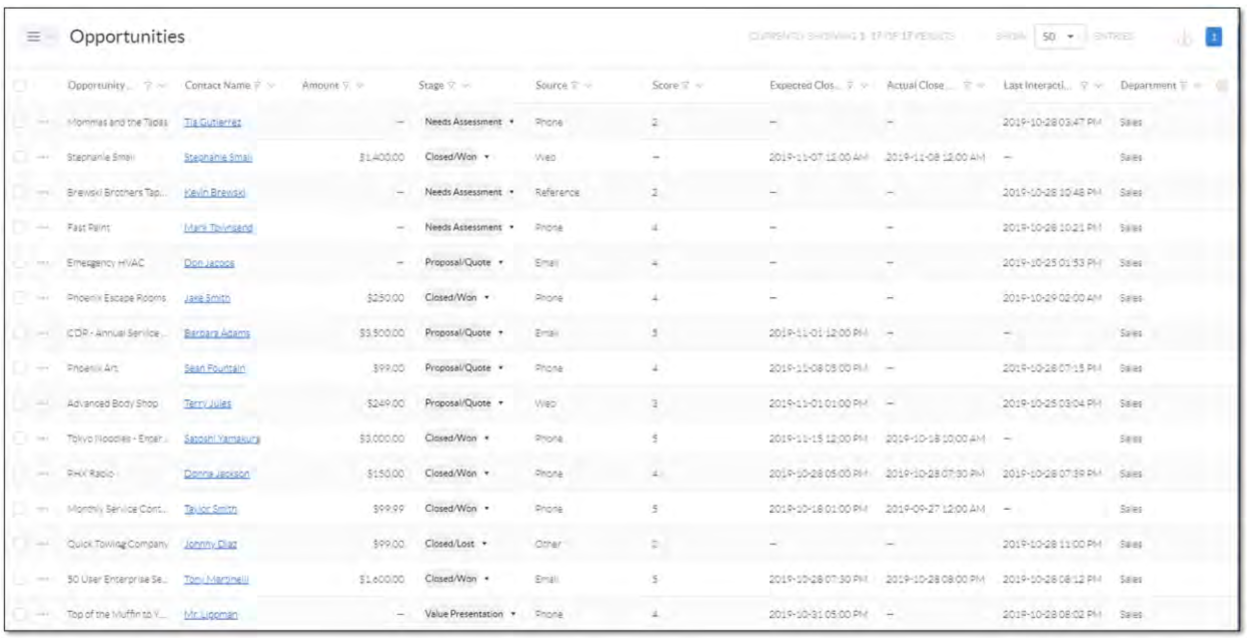
A. **Add New:** Click the **Plus (+)** icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.
B. **View Options:** Select **Table** or **Board** view. For information, see below.
C. **Export Opportunities:** Select the checkbox next to any Opportunity and click **Export** to create a **.csv** file.
D. **View Opportunity Details:** Click the Opportunity to view more information.
E. **More Options:** Click the **Ellipsis (...)** next to a Lead to **Watch**, **Open in Background**, and **Delete**. **Watch** allows you to receive alerts if the Lead is

changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.

**TIP:** Users can override the Product total by entering an amount to reflect discounts or markups.

## Table View

The Table view displays a list of Opportunities as rows in a table with columns of information.


Opportunities

| Opportunity... | Contact Name | Amount | Stage | Source | Score | Expected Clos... | Actual Close ... | Last Interacti... | Department |
|---|---|---|---|---|---|---|---|---|---|
| Mommas and the Tacos | Tia Gutierrez | – | Needs Assessment | Phone | 2 | – | – | 2019-10-28 03:47 PM | Sales |
| Stephanie Small | Stephanie Small | $1,400.00 | Closed/Won | Web | – | 2019-11-07 12:00 AM | 2019-11-08 12:00 AM | – | Sales |
| Brewski Brothers Tap... | Kevin Brewski | – | Needs Assessment | Reference | 2 | – | – | 2019-10-28 10:48 PM | Sales |
| Fast Paint | Mark Townsend | – | Needs Assessment | Phone | 4 | – | – | 2019-10-28 10:21 PM | Sales |
| Emergency HVAC | Don Jacobs | – | Proposal/Quote | Email | 4 | – | – | 2019-10-25 01:53 PM | Sales |
| Phoenix Escape Rooms | Jake Smith | $250.00 | Closed/Won | Phone | 4 | – | – | 2019-10-29 02:00 AM | Sales |
| CDR - Annual Service ... | Barbara Adams | $3,500.00 | Proposal/Quote | Email | 5 | 2019-11-01 12:00 PM | – | – | Sales |
| Phoenix Art | Sean Fountain | $99.00 | Proposal/Quote | Phone | 4 | 2019-11-08 05:00 PM | – | 2019-10-28 07:15 PM | Sales |
| Advanced Body Shop | Terry Jules | $249.00 | Proposal/Quote | Web | 3 | 2019-11-01 01:00 PM | – | 2019-10-25 03:04 PM | Sales |
| Tokyo Noodles - Enter... | Satoshi Yamakura | $3,000.00 | Closed/Won | Phone | 5 | 2019-11-15 12:00 PM | 2019-10-18 10:00 AM | – | Sales |
| PHX Radio | Donna Jackson | $150.00 | Closed/Won | Phone | 4 | 2019-10-28 05:00 PM | 2019-10-28 07:30 PM | 2019-10-28 07:39 PM | Sales |
| Monthly Service Cont... | Taylor Smith | $99.99 | Closed/Won | Phone | 5 | 2019-10-18 01:00 PM | 2019-09-27 12:00 AM | – | Sales |
| Quick Towing Company | Johnny Diaz | $99.00 | Closed/Lost | Other | 2 | – | – | 2019-10-28 11:00 PM | Sales |
| 50 User Enterprise Se... | Tony Martinelli | $1,600.00 | Closed/Won | Email | 5 | 2019-10-28 07:30 PM | 2019-10-28 08:00 PM | 2019-10-28 08:12 PM | Sales |
| Top of the Muffin to Y... | Mr Lippman | – | Value Presentation | Phone | 4 | 2019-10-31 05:00 PM | – | 2019-10-28 08:02 PM | Sales |

*Table View*

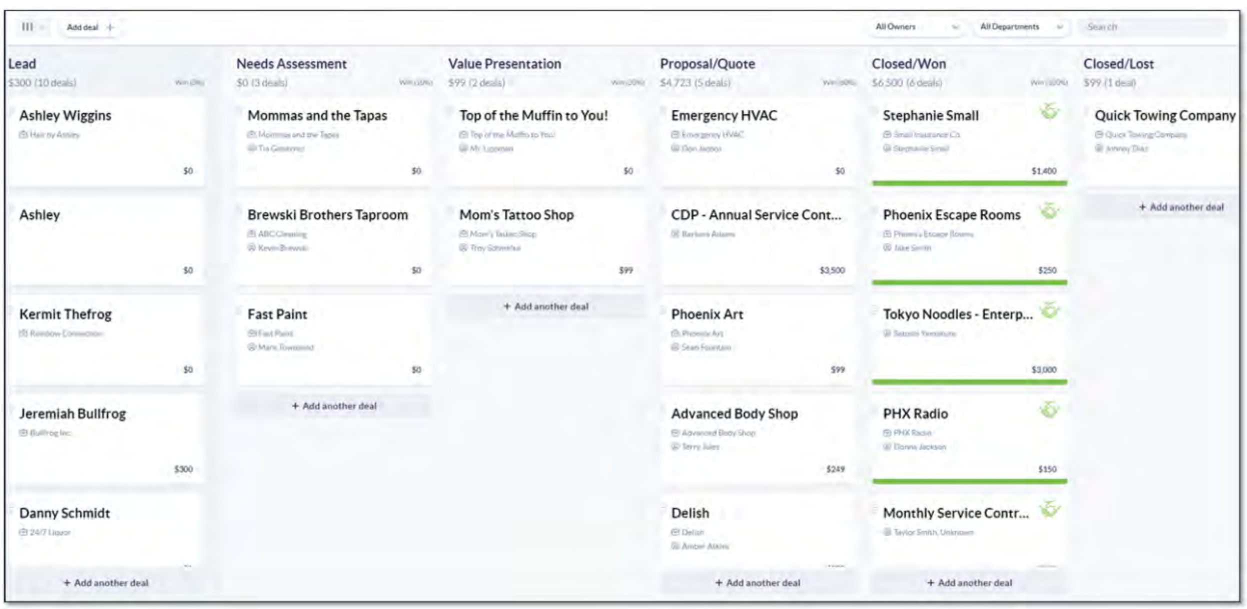
In the **Table** view, Users can easily manage their Opportunities:

- View important Opportunity information such as the Contact, the value of the proposed sale, the current stage of the sale, expected close date, and more.
- Click-and-drag columns to customize the layout.
- Search, filter, and sort the information in each column.

- Click to view and edit the details of an Opportunity.
- Export the Opportunities to a **.csv** file by clicking the **Export** icon at the top-right corner of the window.

## Board View

The **Board** view displays both Leads and Opportunities as tiles on a board to help sales members better visualize their pipeline.




*Board View*

In the **Board** view, manage and track sales from start to finish:

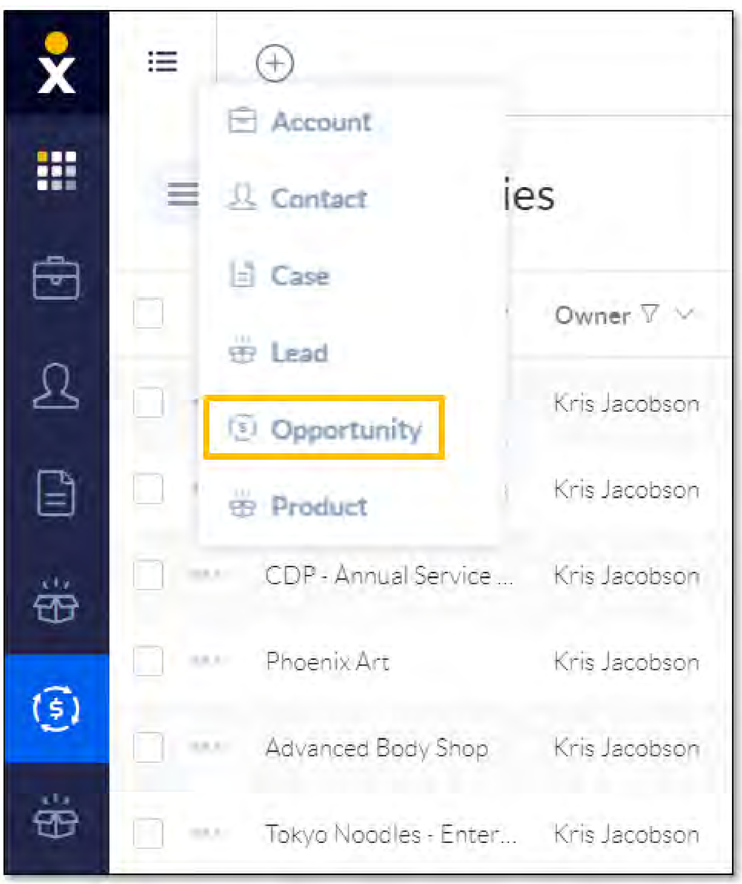
- Qualify a Lead by clicking-and-dragging the tile from the **Lead** column to the first **Opportunity** column.

> **NOTE:** Once a Lead is qualified, Users cannot click-and-drag the tile back to the **Lead** column.

- Move Opportunities through the stages of a sale (by default these stages are setup: **Needs Assessment**, **Value Presentation**, **Proposal/Quote**, and **Closed/Won** or **Closed/Lost**).
- View how much revenue is predicted for each stage.
- Add a new Opportunity by clicking the **Add deal +** button at the top-left corner of the window or the **+Add another deal** button at the bottom of any column but the **Lead** column.
- Add a new Lead by clicking the **+Add another deal** button at the bottom of the **Lead** column.
- Filter by **Owner** and **Department**.
- Search by **Lead** and **Opportunity** name.
- Click the record name to view and edit the details of that record.

## Creating Opportunities

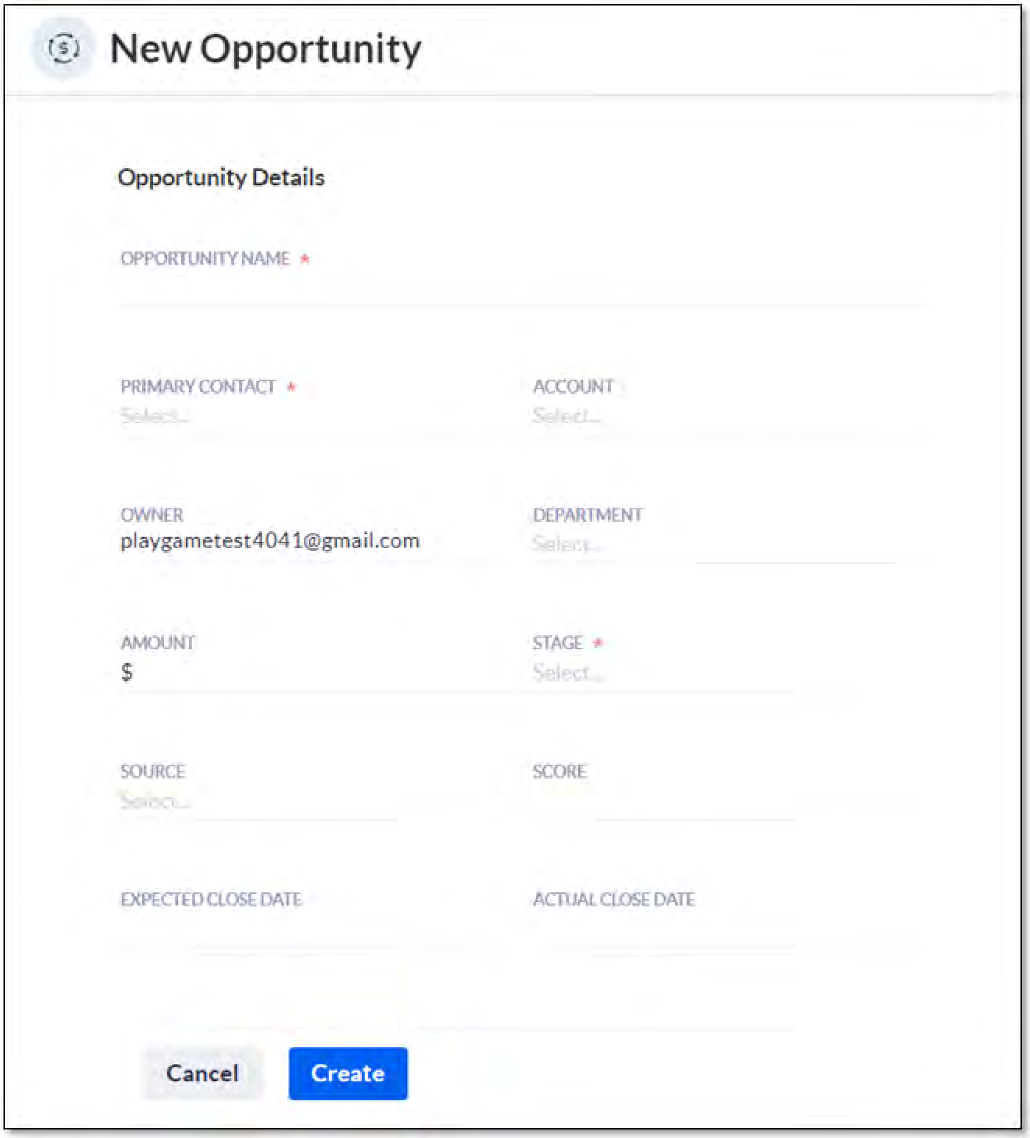
1. Click the **Plus (+)** icon and select **Opportunity.**




*Opportunity Option*

2. Complete the **Opportunity Details** section:
    - **Opportunity Name** (required)
    - **Primary Contact** (required)
    - **Account:** The Account associated with the new Opportunity.
    - **Owner:** The User who owns the Opportunity.
    - **Department:** The department of the owner.
    - **Amount:** The value of the proposed sale.
    - **Stage** (required): **Customizable*
        - **Needs Assessment:** The sales agent is still learning more about the prospect, their business needs, and their pain points with their existing product, as well as working to identify a product package to provide them.
        - **Value Presentation:** The sales agent moved to demonstrating solutions and presenting products based on the specifics identified during the previous stage.
        - **Proposal/Quote:** This stage varies widely from company to company, and may include things like delivering a quote or proposal.
        - **Closed Won/Lost:** As the sales process comes to a close, the sales agent asks the prospect to finalize the deal, which ends in either a win or loss of a sale.
    - **Source:** How did they hear about your company (Phone, Email, Web)?
    - **Expected Close Date:** This is great for more accurate pipeline predictions.
    - **Actual Close Date:** Celebration time.

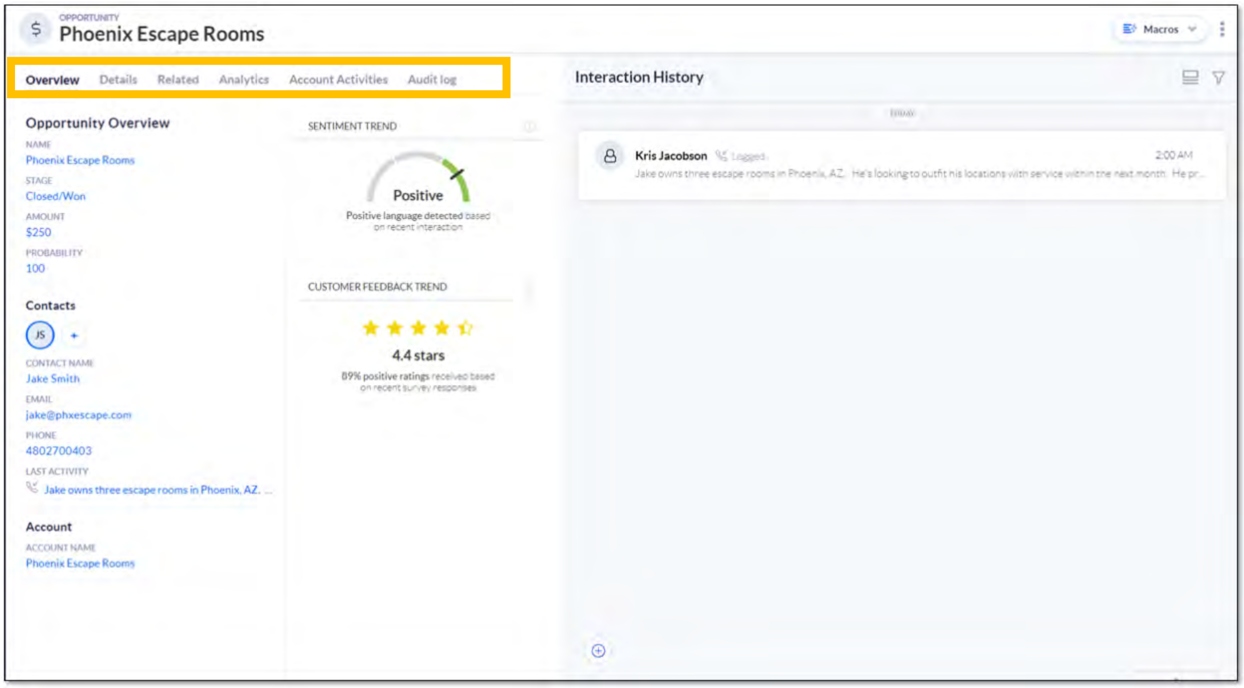
3. Click **Create**.




*Opportunity Details*

## Opportunity Workspace

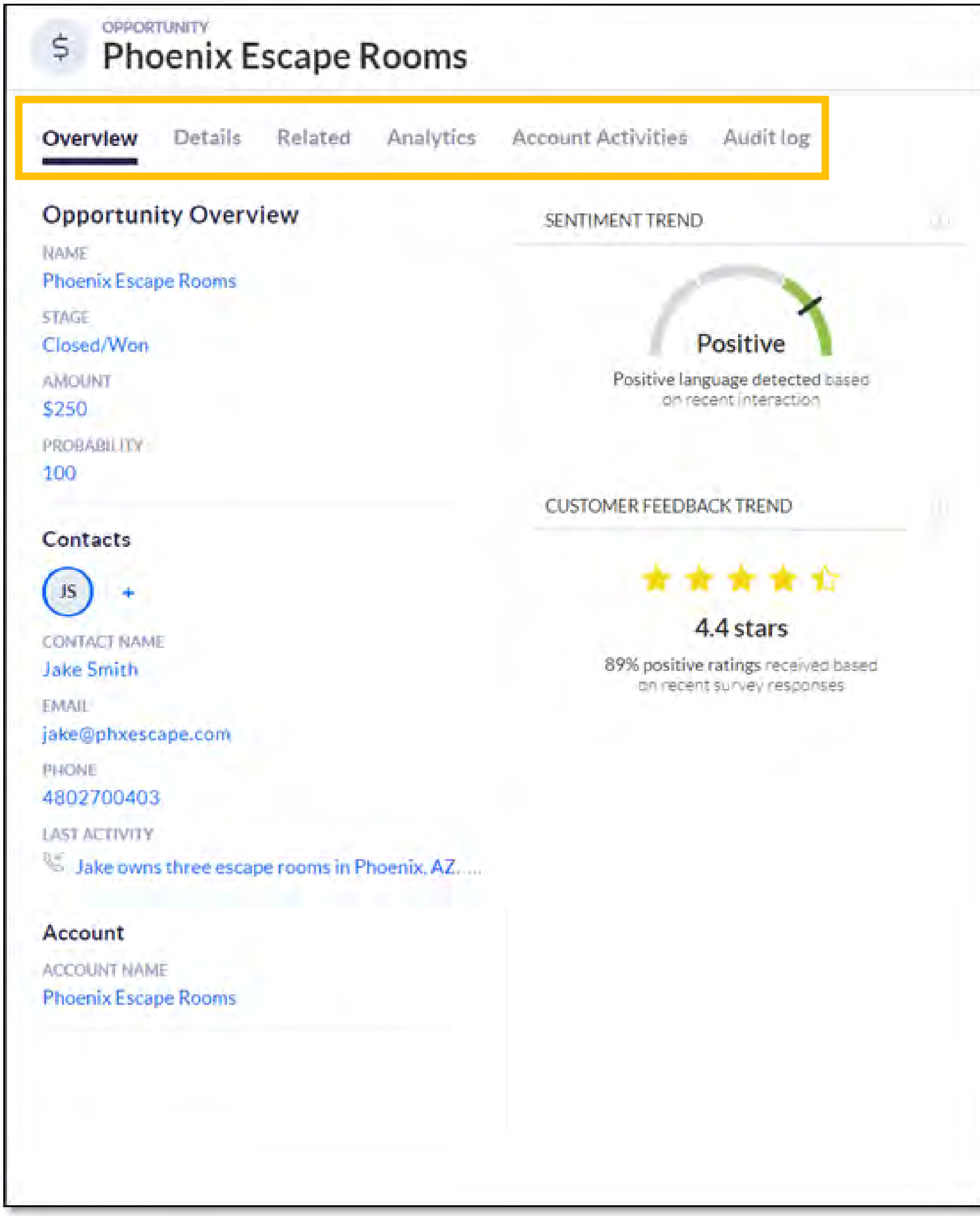
Click on any Opportunity to view the Opportunity Workspace. This Workspace allows Users to easily view and edit Opportunity details, Relationships, Analytics, Interactions, and more. Click any tab at the top to view key information or add new elements without navigating out of the Workspace.




*Opportunity Workspace*

## Overview Tab

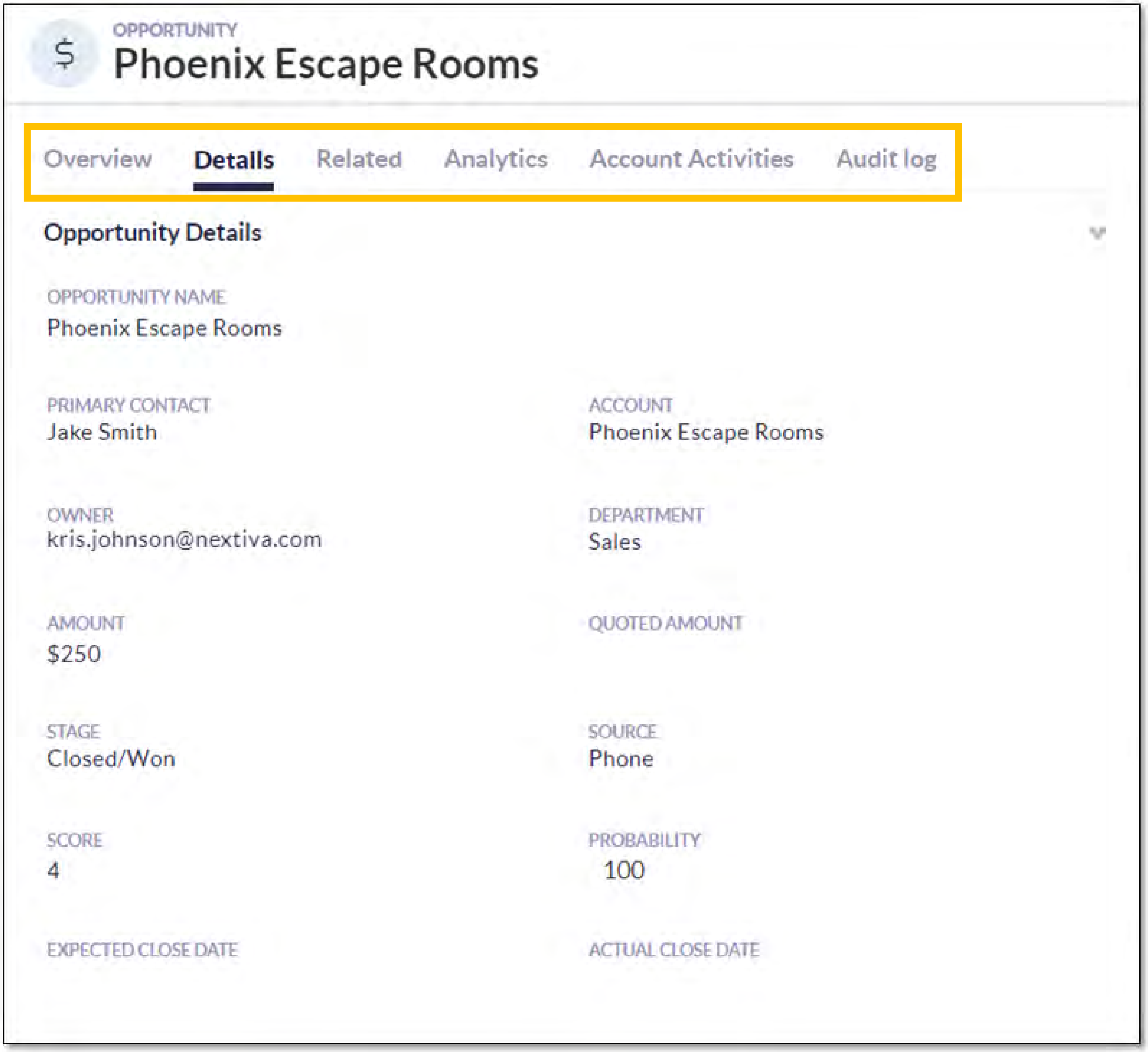
By default, the **Overview** tab shows the Contact name, phone number, email, and shipping and billing addresses. Contacts and Accounts associated with the Opportunity also appear on the Overview tab.




*Overview Tab*

## Details Tab

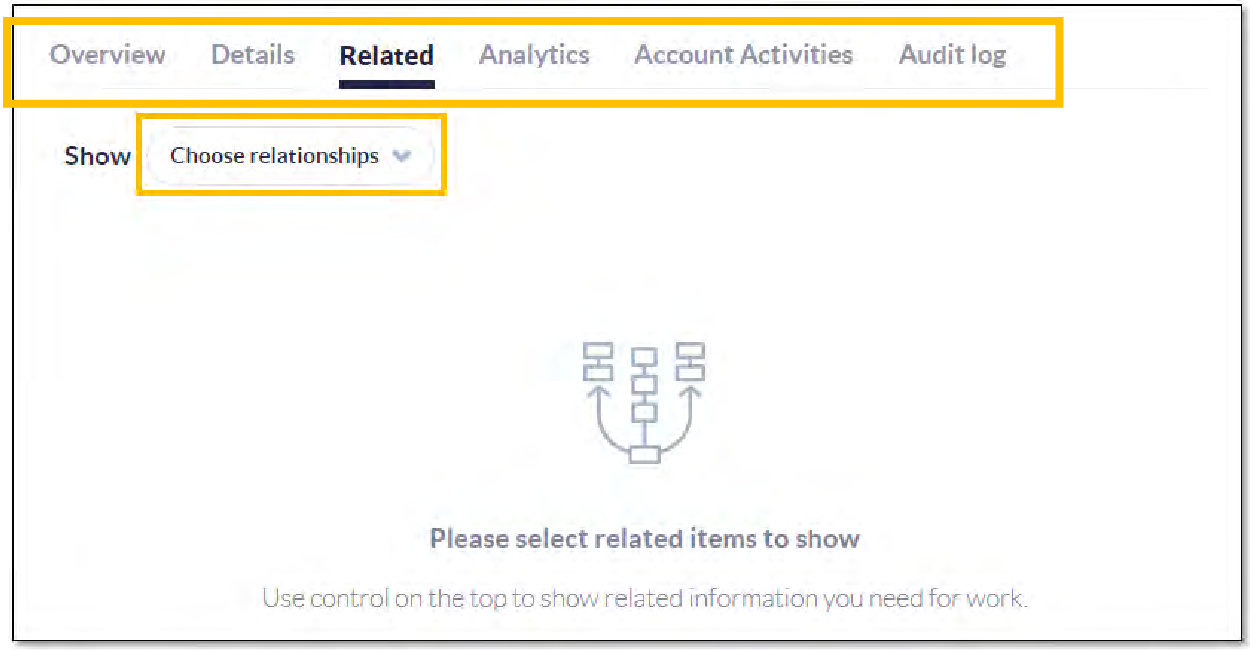
The **Details** tab shows the potential value of the sale, the current sales stage, and more. Users can also view and edit the Contact and Account associated with the Opportunity.




*Details Tab*

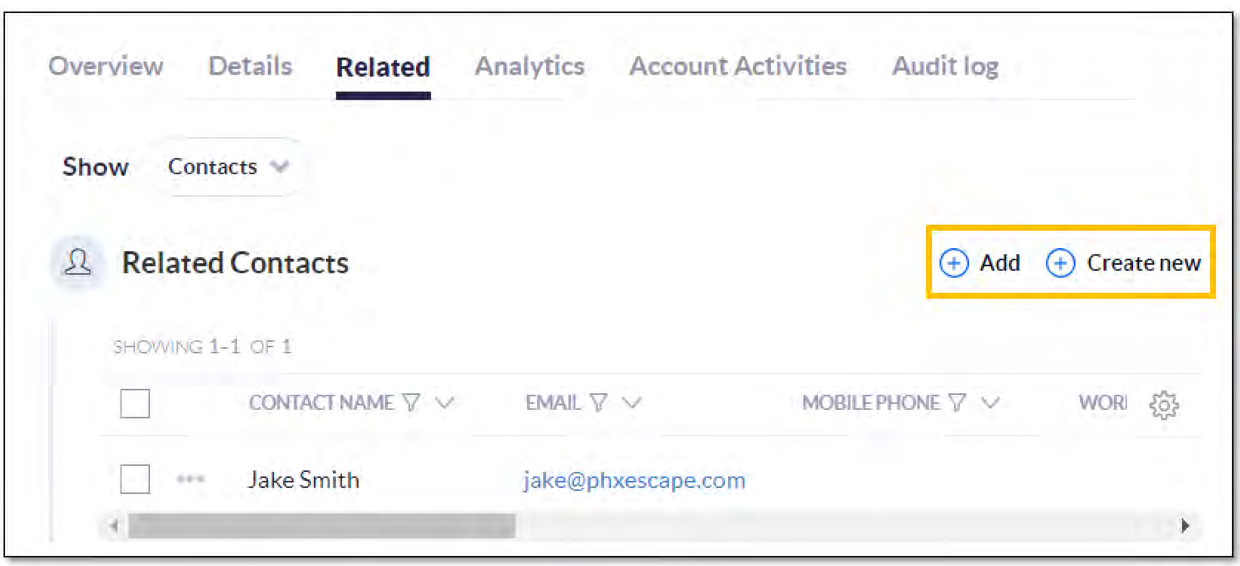
## Related Tab

The **Related** tab displays all relationships associated with the Opportunity. For example, an Opportunity may have multiple contacts, which are setup as a relationship. Click **Choose relationships** and select: **Attachments**, **Contacts**, **or Products** from the drop-down menu.




*Related Tab*

To associate an existing Account with an Opportunity, for example, hover over the top-right corner above the table and click **Add**.




*Add/Create New Options*

## Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

- **Sentiment Trend** estimates how happy the customer is based on the most recent interactions. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

## Account Activities

If there is a Case associated with an Account, the **Account Activities** tab will display all Cases related to the Opportunity. Users can sort Cases by last **Created** or **Updated,** or filter only **Unassigned** Cases.

## Interaction History

Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (**+**) icon on the bottom-left corner of the **Interaction History** feed.


*Interaction History Feed*

# Notes

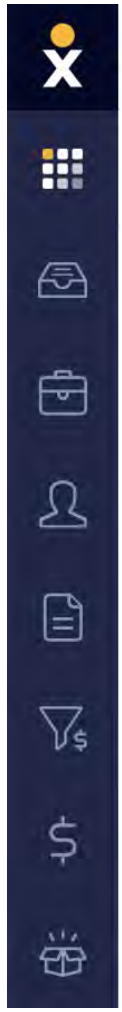
Internal communication regarding a prospect or customer is often just as important as direct-to-customer interactions. Notes about a customer's specific requests or limitations, or anything at all, will be logged and tied to the prospect throughout their relationship with your organization. This keeps all communications centralized and easy to reference or search.

> **TIP:** Flag special or VIP notes to see them any time the Account or Contact is accessed.

## Adding Notes

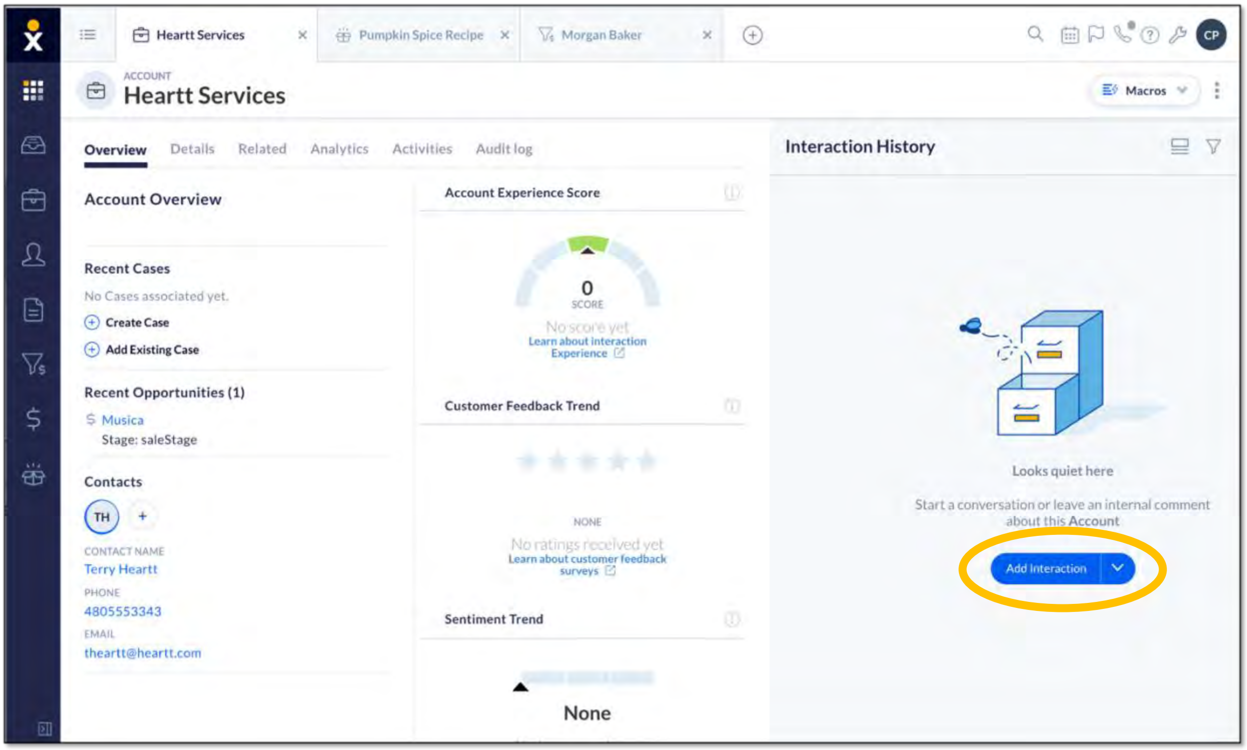
Add Notes associated with anything in Nextiva CRM. Just look for the **Interaction History**.

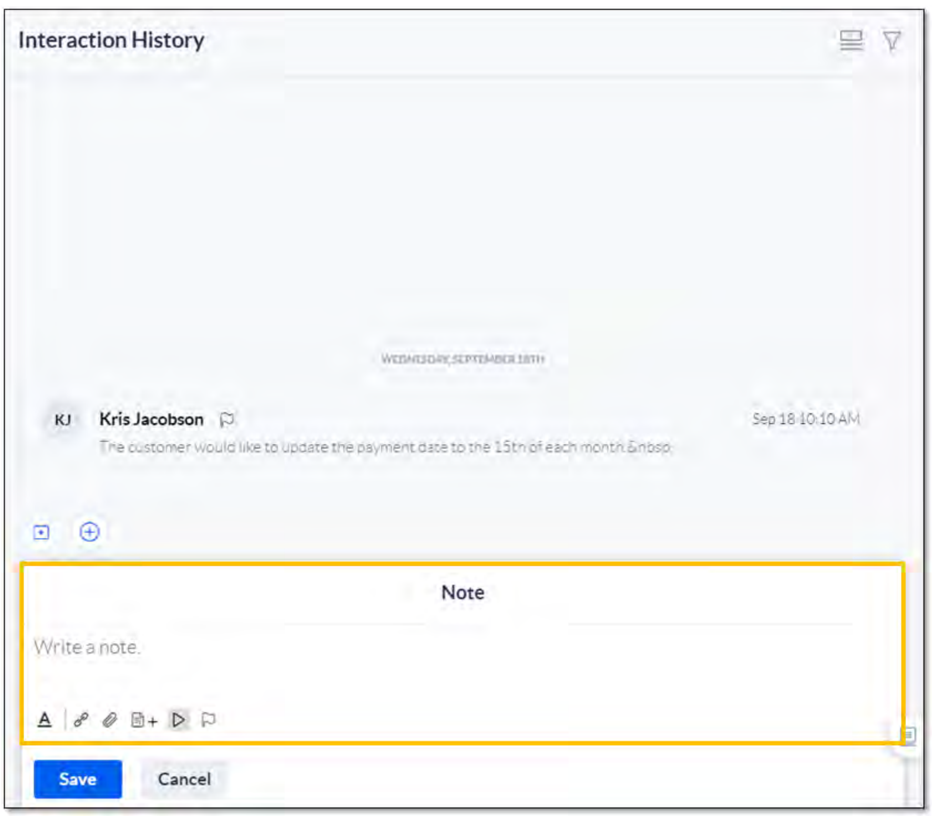
Click on one of these:



*CRM Icons*

For example, let's open an Account to view the Workspace and **Interaction History**.

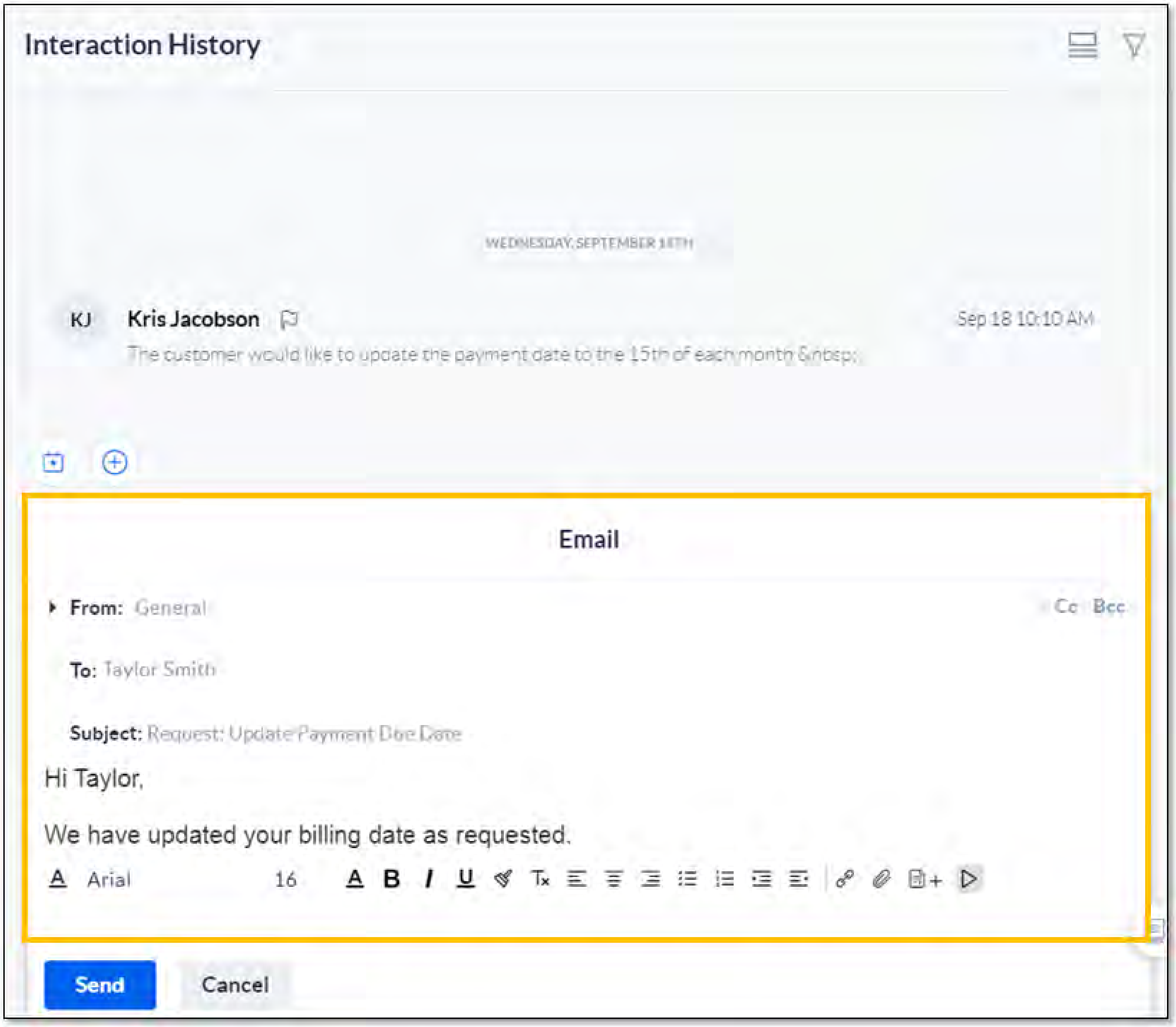



*Interaction History & New Note*

# Interacting via Email

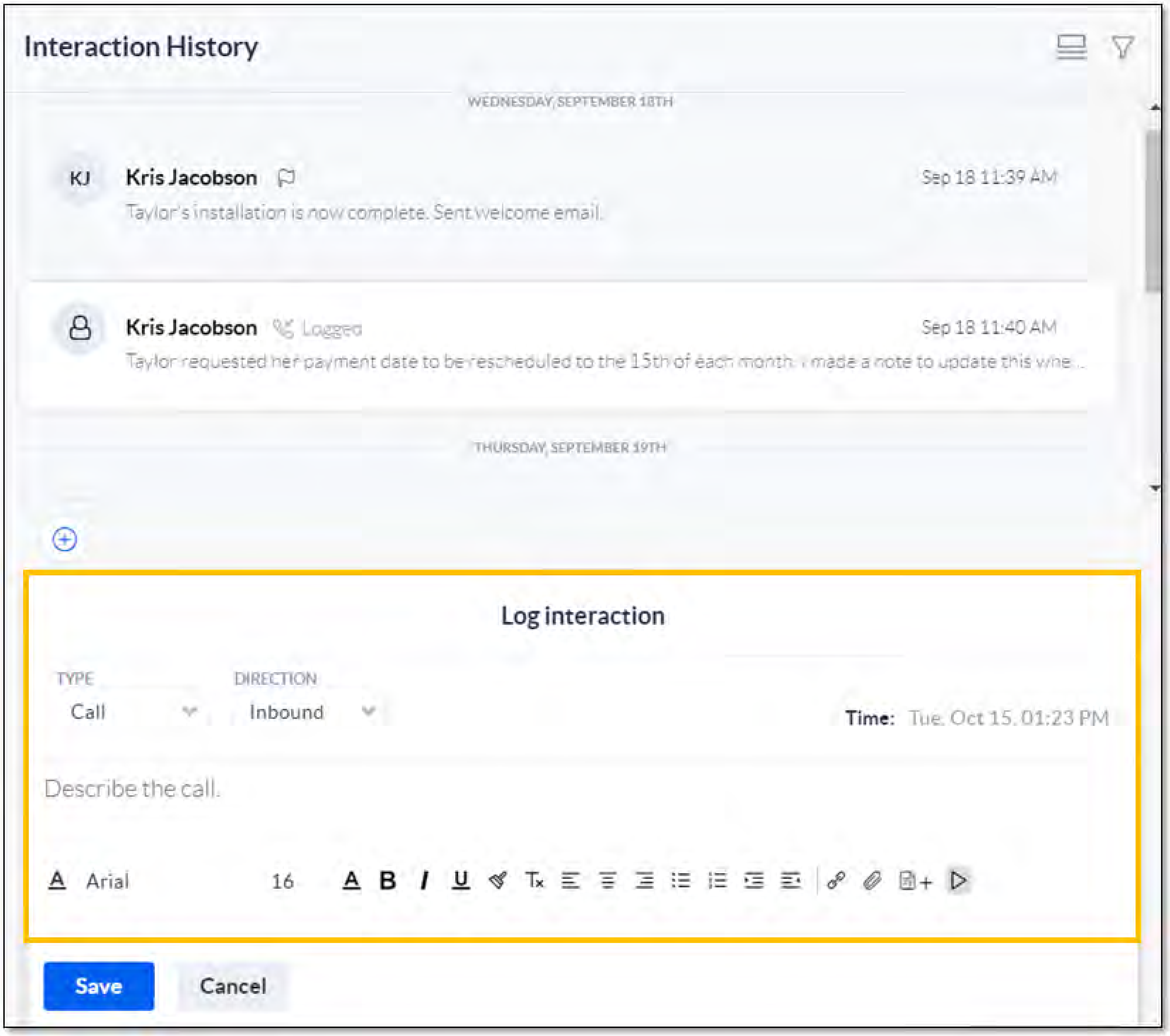
Interact with potential prospects via email also within **Interaction History**.




*New Email*

# Logging Interactions

Log inbound or outbound calls and any other communications.




*Log Interaction*