Beyond Sales and Marketing

The SmartOffice Online Sales Jump Start Package is designed to deliver the greatest amount of benefit to your business in the shortest possible timeframe. However, like most users, once you see the value of SmartOffice, it is likely that you will want to expand your use of the system. SmartOffice Online offers integration with many leading data providers and industry-standard applications, including Albridge Web Services, DST, LaserApp, and Financial Profiles, as well as a full range of industry-specific capabilities, all designed to help you reduce costs and boost sales. Go to www.smartofficeonline.com to learn more about these SmartOffice products:

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> SmartRecruiting
> SmartOpportunities
> SmartWholesale
> SmartLeads
> SmartSeminars
> SmartService
> SmartView for Advisors
> SmartView for Clients
> SmartOffice – Mobile for Palm®
> SmartOffice – Mobile for PocketPC®
> SmartOffice – One Card System™

Call 800-777-9188 to learn how SmartOffice can help you jump start your sales processes to boost sales and generate greater revenue for your business.

SmartOffice Online
Sales Jump Start Package

Your Dreams Have Just Come True!
Introducing the SmartOffice® Online Sales Jump Start Package. Including all of the exciting new features in the recently released SmartOffice 5, the Sales Jump Start Package includes all the tools you need to accelerate your sales process immediately to start helping you make more money today.

Boost the Potential of Every Sales Lead
Leads can originate from a myriad of places — purchased lists, existing clients, incoming calls, your website, seminars, and email campaigns, just to name a few. When a lead is created in SmartOffice, it is assigned to a specific campaign. Using the tools in the SmartOffice Sales Jump Start Package, you can easily track and manage every lead and effectively push it through an automated sales cycle that ensures accountability, provides visibility, and makes it easier to turn leads from any source into actual sales.

Datasheet

How would your business change if you could quickly and easily create and distribute new leads, track hot sales opportunities, and manage campaigns and seminars?

What if your entire contact database could be shared across your business and used for cross-selling, up-selling, and more effective client service?

What if you could see the current status of each and every lead, anytime, anywhere, and identify corrective action before it's too late?
The Smart Sales Cycle

Leads Creation

Every lead that is created in the SmartOffice system is associated with a specific campaign to help track the lead and evaluate marketing effectiveness. For instance, a lead from a cross-selling campaign may be identified with the “life insurance with no disability insurance” campaign. For a new lead from an outside source, it may be associated with the “February referral email campaign”. Once the lead is in the system, it can easily be shared across the organization — all at the touch of a button.

Leads Distribution

Once a lead is created in SmartOffice, you need an effective way to drive it through your sales process. The first step: distributing each lead to the right team member. With SmartOffice, your leads coordinator can easily view new leads by type and status, as well as see which producers are following up on prior leads, to determine the best distribution. The leads coordinator can see a bird’s-eye view of each agent’s progress, and can revoke stale leads and reassign them as needed.

Benefits Include:

- The time-consuming process of leads distribution can now be completed in minutes at the start of each day
- Immediate access to the hot leads that equal new sales
- Visibility into producers’ track records

“Ultimately, SmartOffice is a cost effective and easy way for our advisors to stay on top of it all and to get more chances at bat. And the more they get at bat, the more they’re going to hit home.”

Todd Kim, President
Intermountain Financial Institutional Services

Leads Management

Once a lead is distributed within the system, your producers receive automatic lead alerts — both in SmartOffice and via email. Once in SmartOffice, the producer opens each lead to see which campaign it belongs to, and is given automatic handling options. Once a producer accepts the lead, it becomes an active ‘opportunity’.

Next, depending on the producer’s choices within the system, SmartOffice can:

- Schedule a call to the lead on the producer’s calendar
  The item is scheduled in SmartOffice and/or Outlook or Lotus Notes, and the producer is alerted prior to the call.
- Send a campaign-specific email, letter, or fax
  A pre-existing letter is sent to the contact based on their communication preference (email, letter, or fax). Using this tool, producers can execute mass mailings with very little effort.
- Call the contact to schedule an appointment
  SmartOffice times each call, provides a call script if needed, and prompts an ‘activity outcome’ screen where call notes can be entered and a follow-up appointment can be scheduled (and automatically entered on the producer’s calendar). The producer can also change the sales stage for the contact and enter an estimate of the projected revenue from the sale.

Benefits Include:

- An automated process for moving leads through the sales process
- Easy, online tracking of calls and other lead activity
- Fewer stale and forgotten leads to drive more sales

Sales Management

For the management team, SmartOffice provides complete visibility across the entire sales process. Managers can run the following detailed, graphical reports — again, all at the touch of a button:

- Production (by producer, office, region, etc.)
- Opportunities
- Sales pipeline
- Estimated revenue
- Campaign effectiveness
- Opportunities lost

Benefits Include:

- Easy-to-read reports to drive better sales and marketing decisions
- Information to identify bottlenecks and determine which campaigns are driving the most sales
- Visibility into your team’s successes to identify where help is needed
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Benefits Include:

- Supports fast and easy lead distribution and management
- Gives marketing the ability to easily track and report on campaign success

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