



Sales Support Action Items

Lead Generation

- **Action Item: Conduct Lead Research**
 - **Deliverable:** A comprehensive list of high-potential leads, including detailed contact information and company profiles, tailored to your target market.
- **Action Item: Implement Lead Qualification Process**
 - **Deliverable:** A qualified lead list with detailed scoring and ranking based on criteria such as engagement level, company size, and purchasing potential.
- **Action Item: Develop Lead Nurturing Strategy**
 - **Deliverable:** A customized lead nurturing plan, including email sequences, follow-up schedules, and engagement tactics designed to convert leads into prospects.
- **Action Item: Organize Lead Database**
 - **Deliverable:** An updated and well-organized lead database with accurate and current contact details, segmented by lead quality and source.
- **Action Item: Launch Lead Generation Campaign**
 - **Deliverable:** A fully executed lead generation campaign, including campaign strategy, creative assets, and performance metrics, such as lead volume and conversion rates.

CRM Management

- **Action Item: Set Up and Customize CRM System**
 - **Deliverable:** A configured CRM system tailored to your business needs, including customized fields, workflows, and user permissions, along with a setup report.
- **Action Item: Perform Data Entry and Cleanup**
 - **Deliverable:** Accurate data entry and a cleaned-up CRM database with updated customer information and removal of duplicate or outdated records.
- **Action Item: Track Customer Interactions**
 - **Deliverable:** Detailed logs of customer interactions, including emails, calls, and meetings, integrated into the CRM for improved visibility and follow-up.
- **Action Item: Generate CRM Reports and Analytics**
 - **Deliverable:** Regular CRM reports and analytics, including insights into customer behavior, CRM usage, and sales pipeline status, with actionable recommendations.
- **Action Item: Optimize CRM Workflows**
 - **Deliverable:** Enhanced CRM workflows and processes, including improved automation, task management, and user interface adjustments for better efficiency.



Sales Reporting

- **Action Item: Track Sales Metrics**
 - **Deliverable:** A detailed tracking system for key sales metrics such as lead conversion rates, sales cycle length, and revenue performance, with periodic updates.
- **Action Item: Create Sales Performance Dashboards**
 - **Deliverable:** Interactive sales dashboards with visual representations of sales data, trends, and key performance indicators (KPIs) for real-time monitoring.
- **Action Item: Prepare Sales Performance Reports**
 - **Deliverable:** Comprehensive sales performance reports analyzing sales activities, team performance, and outcomes, including insights and recommendations for improvement.
- **Action Item: Conduct Sales Forecasting and Analysis**
 - **Deliverable:** Accurate sales forecasts and trend analyses to predict future performance, identify growth opportunities, and guide business strategies.
- **Action Item: Evaluate Sales Campaign Effectiveness**
 - **Deliverable:** A detailed evaluation of sales campaign performance, including ROI analysis, effectiveness metrics, and recommendations for optimizing future campaigns.

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