Core Platform Product Updates

Made to Deliver Higher Sales & Marketing Productivity

- Kiranmayi S and Kritika Soni

YOUR SPEAKERS

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Associate Product Manager

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G Suryateja

Product Manager

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What is Covered

- **UX improvements**
  - Repositionable action column on Lead Grid
  - Quick filters in Opportunity Management

- **New Filters**
  - Ability to filter tasks based on completed date
  - Option to filter activities with/without attachments in advance search

- **Extended Limits**
  - User Management supports up to 100 custom user fields
  - Support for up to 2000 teams with improved UI

- **Web App : Advanced configuration settings**

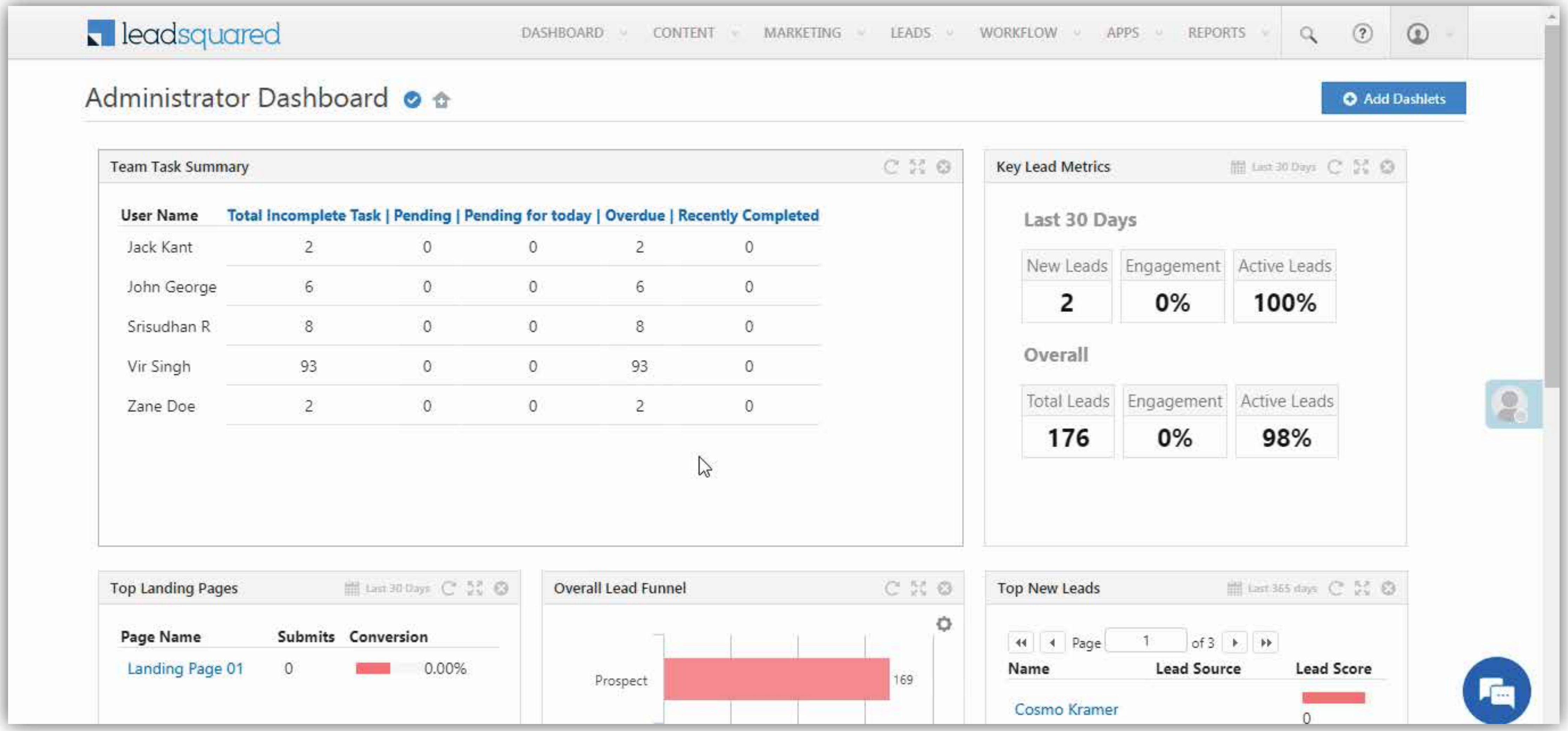
Repositionable Actions Column on Lead Grid

Business Need:
Sales users often have a personalized Lead Grid. At times, these Lead Grids could be too long and to complete each action the users may have to scroll horizontally to reach the action column. This is time consuming and may lead to context loss

Feature Overview:
Action column can be repositioned in any sequence in the grid as per the user's preference.

Value Proposition:
Flexibility to reposition action column improves user experience and improves user productivity

Demo



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DASHBOARD
CONTENT
MARKETING
LEADS
WORKFLOW
APPS
REPORTS
Administrator Dashboard
Add Dashlets
Team Task Summary
User Name
Total Incomplete Task | Pending | Pending for today | Overdue | Recently Completed
Jack Kant 2 0 0 2 0
John George 6 0 0 6 0
Srisudhan R 8 0 0 8 0
Vir Singh 93 0 0 93 0
Zane Doe 2 0 0 2 0
Key Lead Metrics
Last 30 Days
New Leads 2
Engagement 0%
Active Leads 100%
Overall
Total Leads 176
Engagement 0%
Active Leads 98%
Top Landing Pages
Last 30 Days
Page Name
Submits
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Landing Page 01 0 0.00%
Overall Lead Funnel
Prospect
169
Top New Leads
Last 365 days
Page 1 of 3
Name
Lead Source
Lead Score
Cosmo Kramer
0

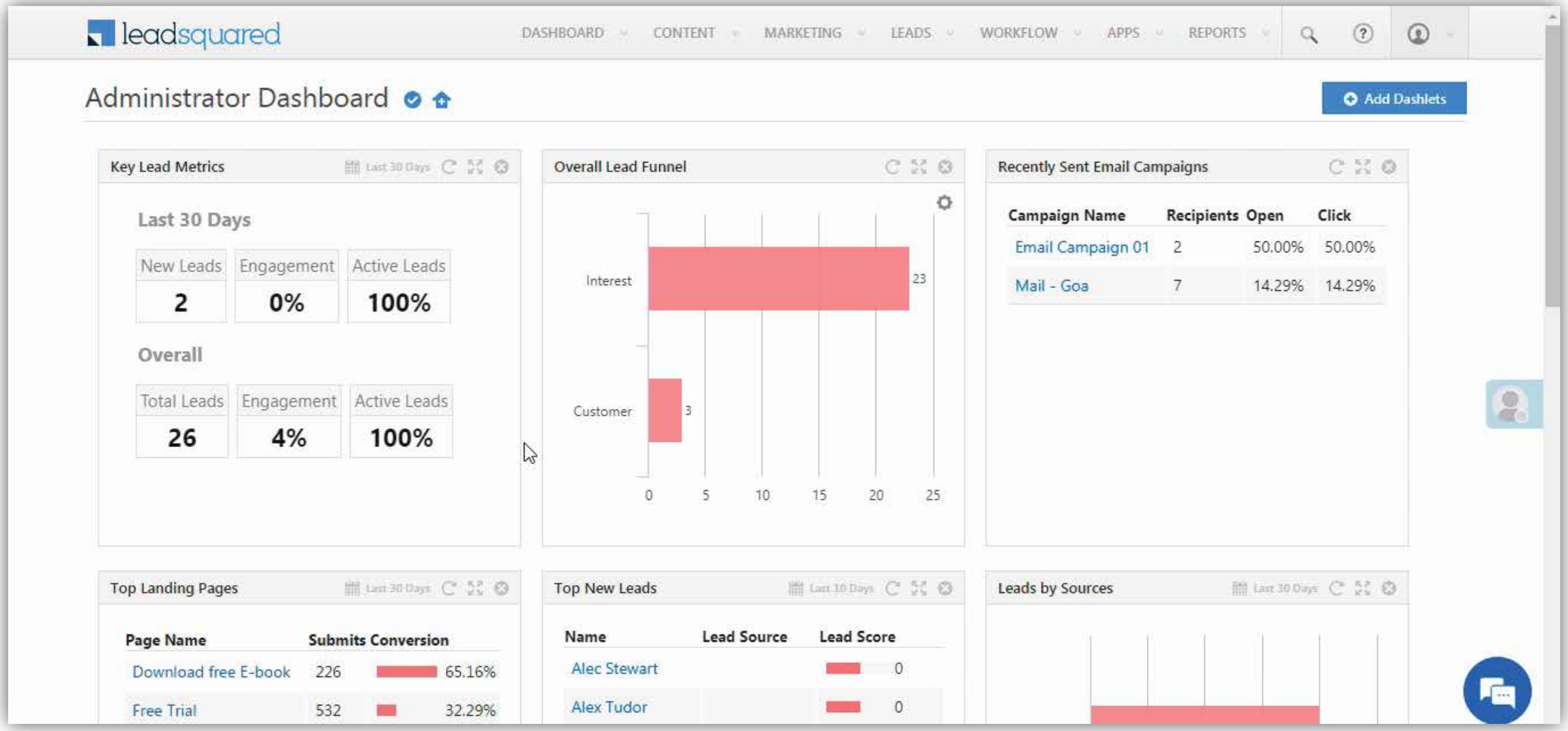
Quick Filters in Opportunity Management

Business Need:
Tracking opportunity based on parameters such as timeline and status was a tedious process for sales managers. Sales managers had to apply the required conditions in advance search to get the required list.

Feature Overview:
The user is given the provision to quickly and easily create quick filters to access required opportunities with the given criteria.

Value Proposition:
Retrieve the required opportunity list with a click of a button

Demo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Key Lead Metrics
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Last 30 Days
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Recently Sent Email Campaigns
Campaign Name Recipients Open Click
Email Campaign 01 2 50.00% 50.00%
Mail - Goa 7 14.29% 14.29%
Top Landing Pages
Last 30 Days
Page Name Submits Conversion
Download free E-book 226 65.16%
Free Trial 532 32.29%
Top New Leads
Last 10 Days
Name Lead Source Lead Score
Alec Stewart 0
Alex Tudor 0
Leads by Sources
Last 30 Days

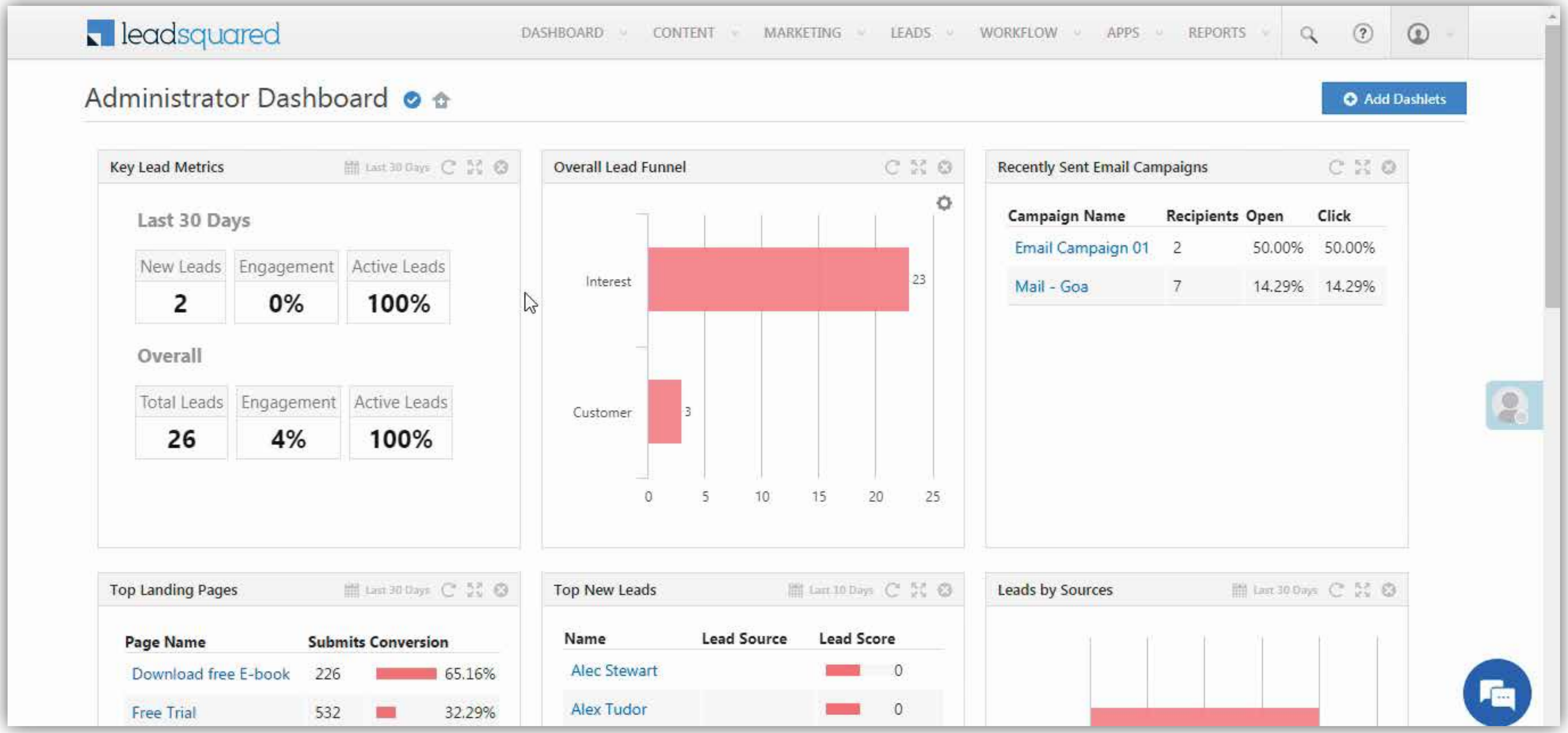
Ability to Filter Tasks Based on Completed Date

Business Need:
There were no provision was available to filter and view the task completed for a time duration. Sales managers had to depend on tedious workarounds to monitor team's performance, which in turn affected the productivity.

Feature Overview:
New filter on task management and smart view page to filter tasks based on timeline

Value Proposition:
Monitor team's performance easily with task completed filter from within the product

Demo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Add Dashlets
Key Lead Metrics
Last 30 Days
Last 30 Days
New Leads
2
Engagement
0%
Active Leads
100%
Overall
Total Leads
26
Engagement
4%
Active Leads
100%
Overall Lead Funnel
Interest
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Customer
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Recently Sent Email Campaigns
Campaign Name
Recipients
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Email Campaign 01
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Page Name
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Download free E-book
226
65.16%
Free Trial
532
32.29%
Top New Leads
Last 10 Days
Name
Lead Source
Lead Score
Alec Stewart
0
Alex Tudor
0
Leads by Sources
Last 30 Days

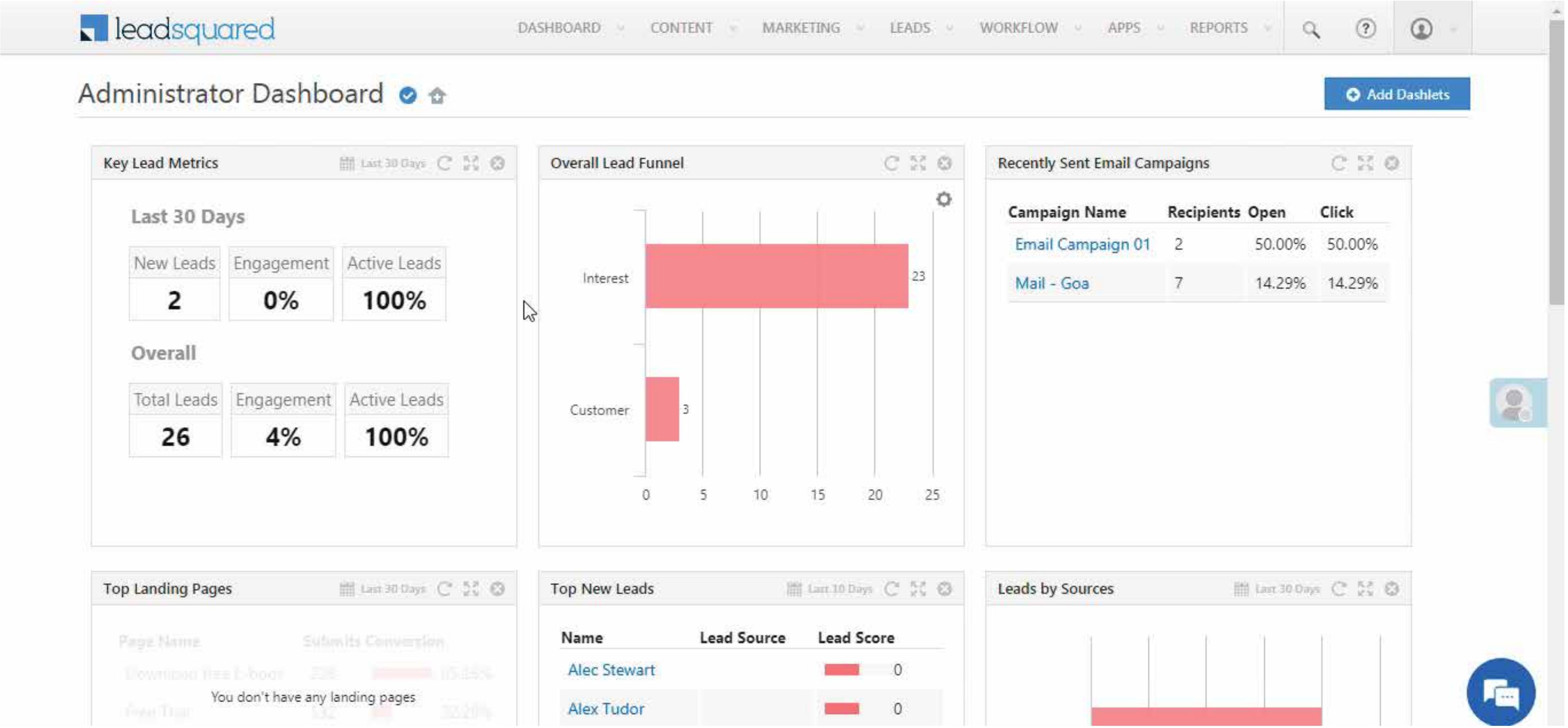
Option to Filter Activities With/Without Attachments in Advance Search

Business Need:
Sales user logs customer demos as activity in LeadSquared. Sales managers need to monitor these activities and take necessary actions to improve these demos. In order to full fil this, a provision was required for sales managers to quickly search activities with attachment.

Feature Overview:
Enhanced search option with a provision to search activities with or without attachments

Value Proposition:
Easily track activities

Demo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Key Lead Metrics
Last 30 Days
Last 30 Days
New Leads
2
Engagement
0%
Active Leads
100%
Overall
Total Leads
26
Engagement
4%
Active Leads
100%
Overall Lead Funnel
Interest
23
Customer
3
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25
Recently Sent Email Campaigns
Campaign Name
Recipients
Open
Click
Email Campaign 01
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50.00%
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Mail - Goa
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14.29%
14.29%
Top Landing Pages
Last 30 Days
You don't have any landing pages
Top New Leads
Last 10 Days
Name
Lead Source
Lead Score
Alec Stewart
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Alex Tudor
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Leads by Sources
Last 30 Days

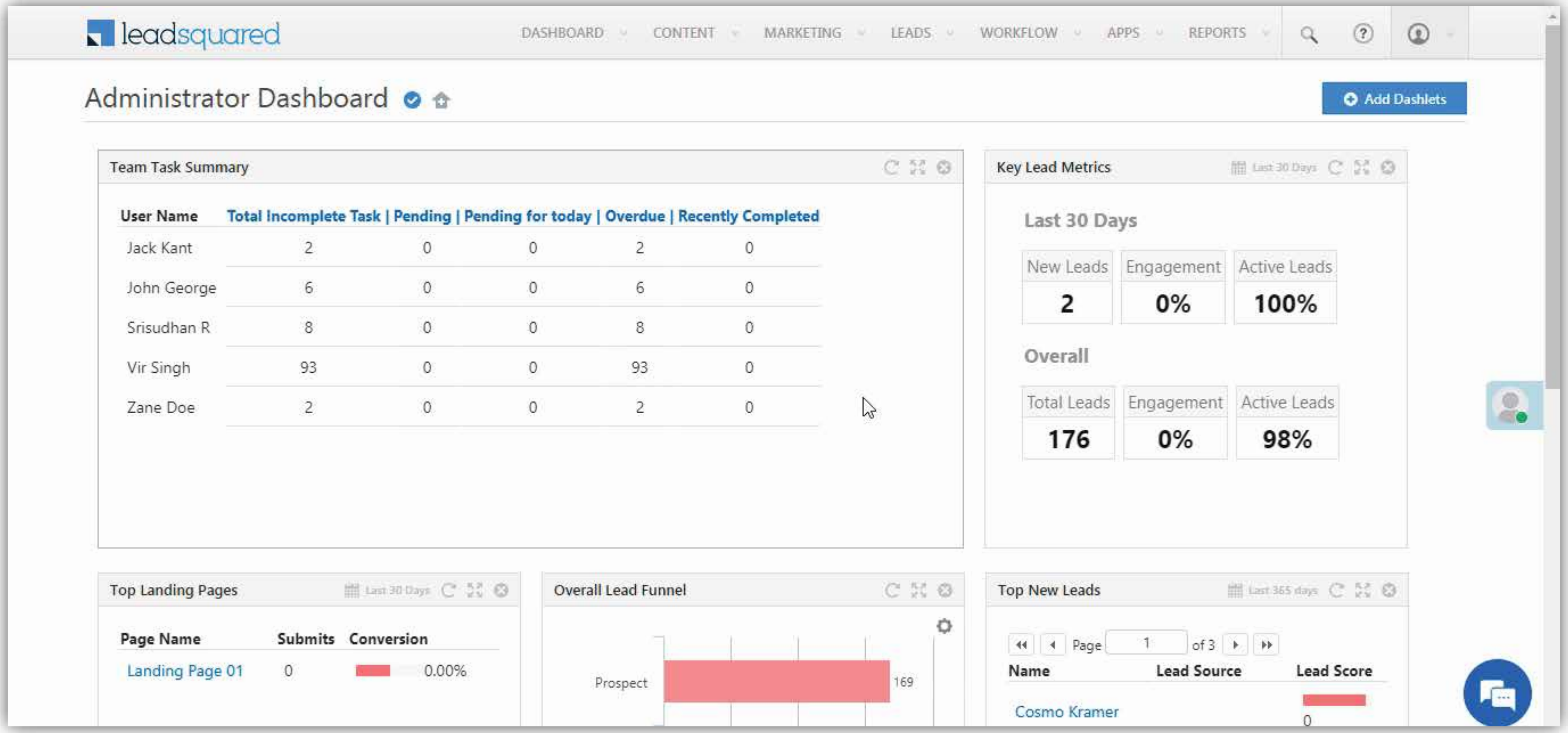
User Management Supports up to 100 Custom User Fields

Business Need:
Most EdTech customers need to store considerable user information such as region, city, address, center Id, course code, etc. This information will be used for lead distribution. The current limit of 10 custom user fields is not sufficient to store the complete employee information.

Feature Overview:
Provision to create up to 100 custom user fields to store employee information

Value Proposition:
- Additional user fields to store employee data
- Sync HRMS data with LeadSquared

Demo



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Top Landing Pages
Page Name
Submits
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0.00%
Overall Lead Funnel
Prospect
169
Top New Leads
Page
1
of 3
Name
Lead Source
Lead Score
Cosmo Kramer
0

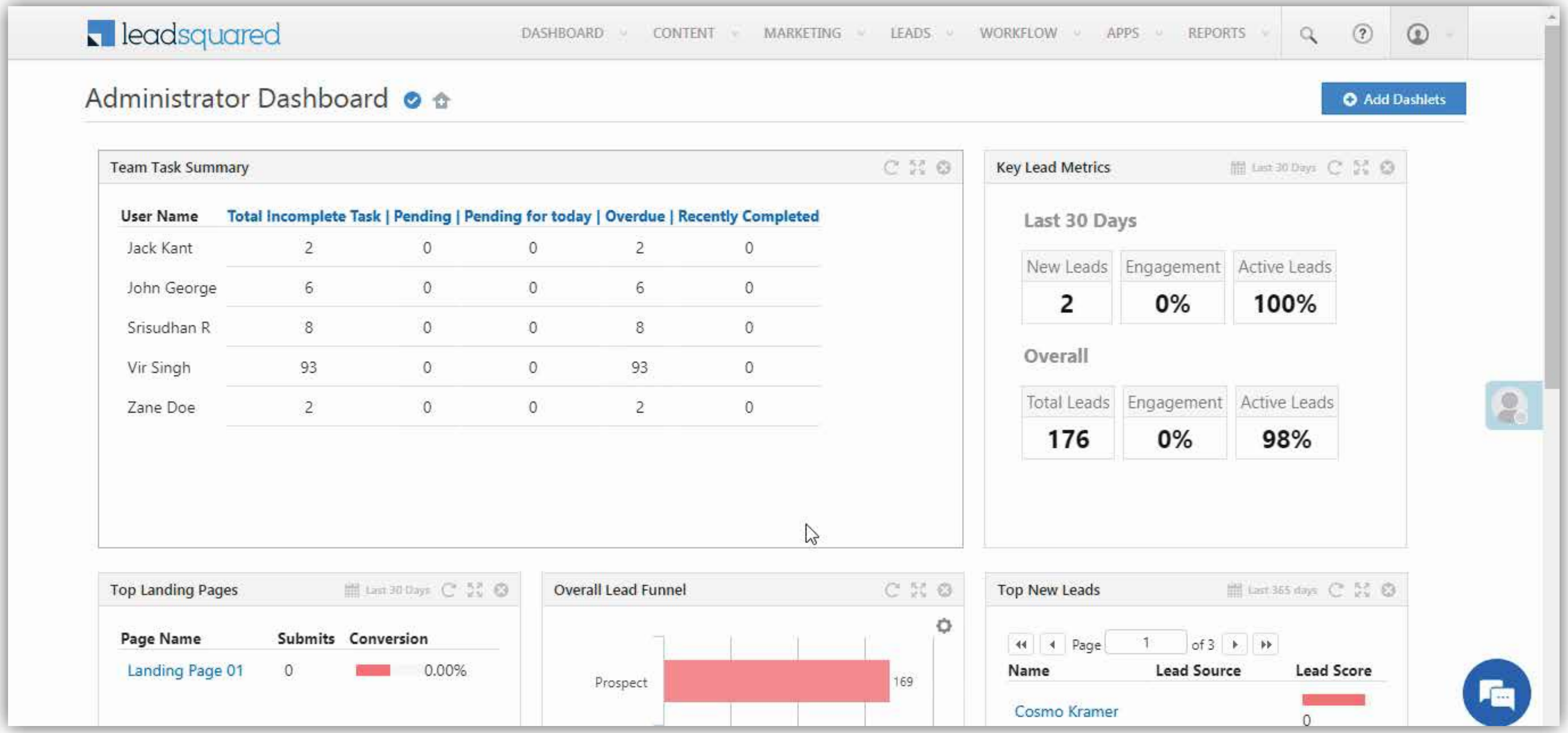
Support for up to 2000 Teams With Improved UI

Business Need:
Different teams and sub-teams will be created to apply smart views and user dashboards to see the relevant information. Current limit restricted support for larger teams.

Feature Overview:
Provision to support up to 2000 teams

Value Proposition:
Improved experience to manage larger teams effectively.

Demo



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Name Lead Source Lead Score
Cosmo Kramer
0

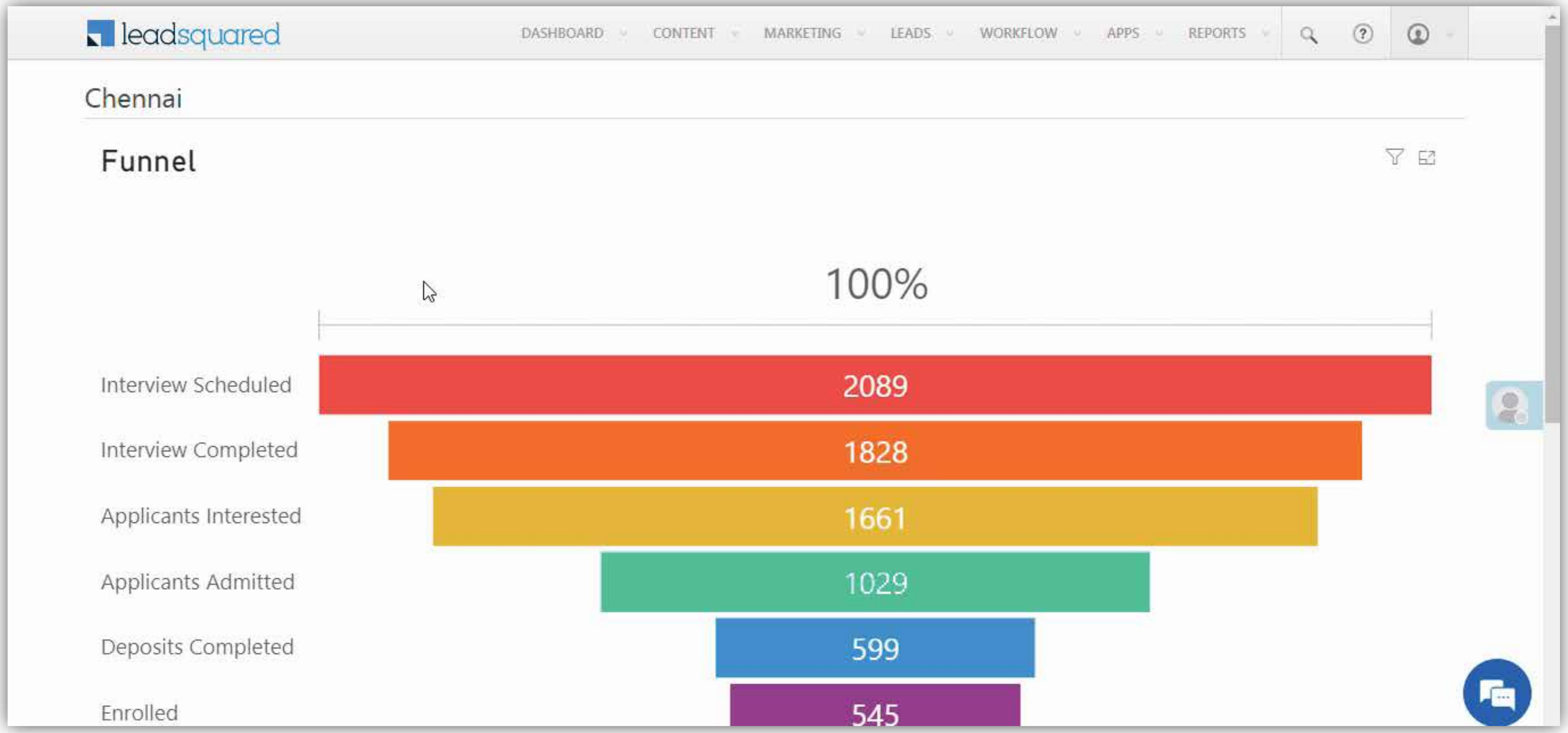
Advanced configuration settings : View Relevant Email Templates

Business Need:
Sales users would want to view only those email templates that are relevant to the product they are handling. Often email campaign library will have more templates than what is required which contributes to a delay in achieving the desired result

Feature Overview:
Enabling the newly introduced configuration will allow sales users to view only relevant templates in the library

Value Proposition:
Easy access to the templates that are relevant

Demo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Interview Scheduled
2089
Interview Completed
1828
Applicants Interested
1661
Applicants Admitted
1029
Deposits Completed
599
Enrolled
545

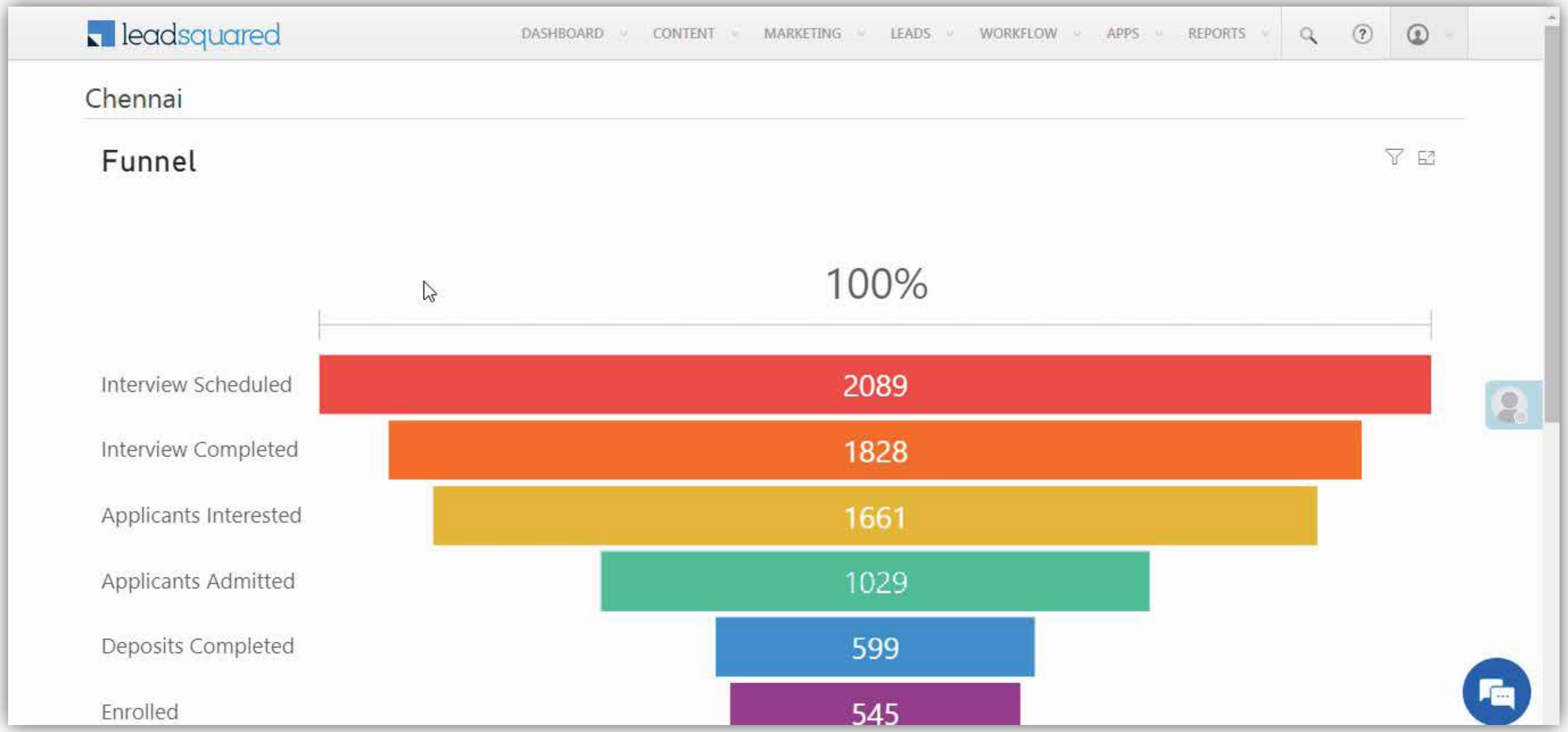
Advanced configuration settings : Restriction to Create Template

Business Need:
Many a time it is not required for the sales users or managers to create email templates. They can utilize the email templates created by marketing team.

Feature Overview:
- User specific restriction to create email templates.
- Applicable restricted roles- Sales users and sales managers

Value Proposition:
Adherence to organization wide workflow requirement

Demo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Interview Completed
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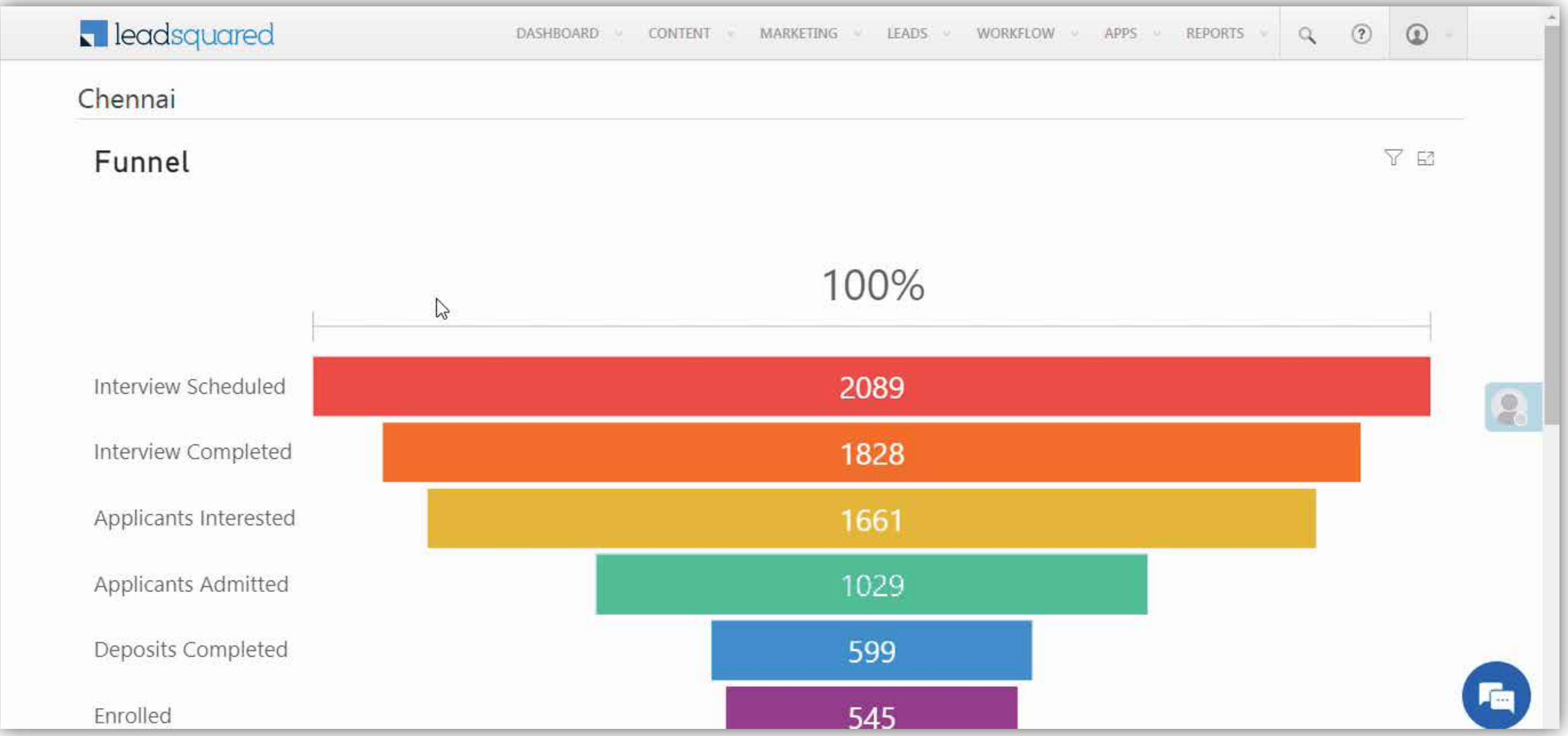
Advanced configuration settings : Restriction to Download Call recordings

Business Need:
Users can download confidential audio clips like call recordings, demo recordings and use them outside the application, leading to a security breach.

Feature Overview:
When enabled, users won't be able to download audio attachments but can play the audio in the application.

Value Proposition:
- Maintains the confidentiality of call and demo recordings.
- The public URL will be invisible, and hence audio-type attachments can't be shared within/outside the organization due to security reasons.

Demo



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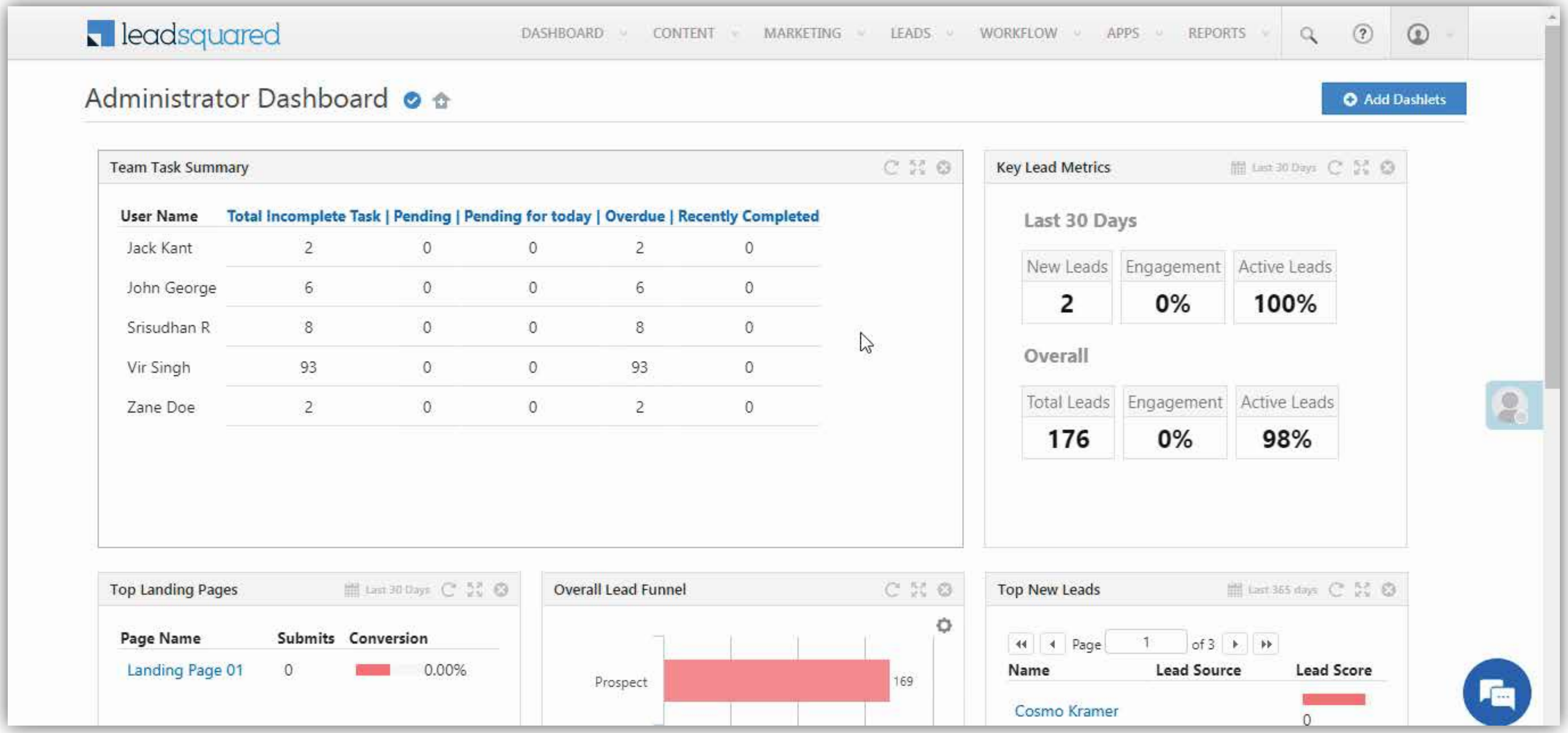
Advanced configuration settings : Tab Customization

Business Need:
All users in any account will have Activity History as the default tab on the Lead Details page. Users will be taken to default tab every time they access Lead Details Page. If all the users in an organization uses a particular tab as default, then they had to create it individually. There were no provision for admins to push an organization wide tab customization.

Feature Overview:
This setting lets' admin set up an account level default tab on the lead details page.

Value Proposition:
Admin can customize default tab based on the important tab at the account level for which all users action is not required.

Demo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Top Landing Pages
Page Name Submits Conversion
Landing Page 01 0 0.00%
Overall Lead Funnel
Prospect 169
Top New Leads
Page 1 of 3
Name Lead Source Lead Score
Cosmo Kramer 0

LeadSquared
Automation Updates
April 2021

- Abhinav Mahajan

What is LeadSquared Automation?

- Automate your entire workflow using an intuitive and easy to use visual designer. It's a powerful way to push your leads to conversion! without any manual effort.

- Few examples of automated workflows-
  - Send automated campaigns to leads and follow up based on their behavior
  - Nurture leads with the right messages depending on their engagement.
  - Automatically distribute leads to users/groups based on location, interests, products, etc.
  - Automatically check-in/check-out your users, create tasks and alerts based on their availability

New Features

User-Specific Lead Assignment Quota

Feature Overview

- Assign lead distribution quotas for individual users (rather than all the users in a specific role)

- Define user-specific quotas for different durations such as
  - Daily, weekly or monthly lead assignment quota

User-Specific Lead Assignment Quota

Value Proposition

- Easily manage Lead Distribution for each individual sales user
- Enough flexibility to set limits on lead distribution quotas for individual users (rather than having a quota at the user role level)
- Further define quotas for different durations such as daily, weekly, monthly quotas for each user
- You can even put default quota values at user level

User-Specific Lead Assignment Quota

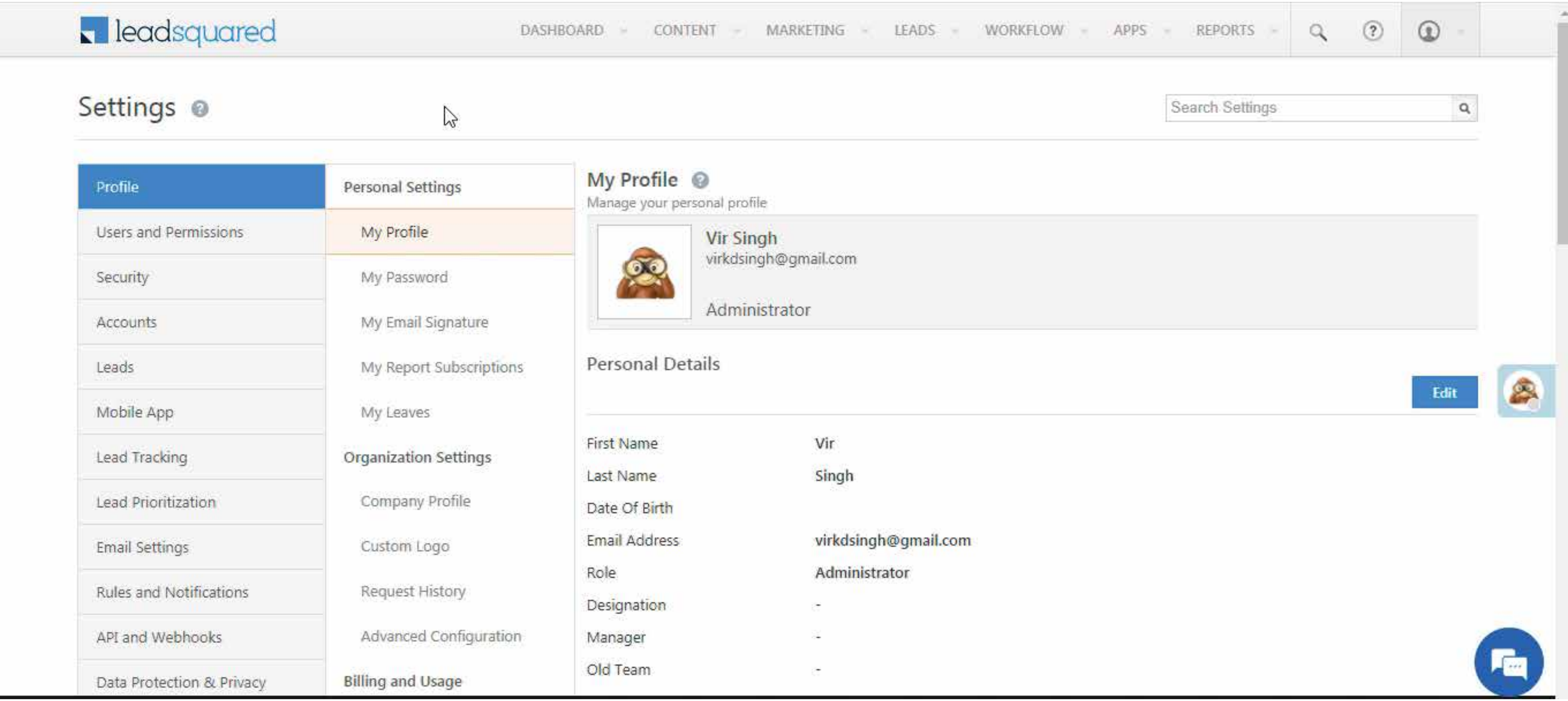
Business Use-case

- If a company wants to assign 50 leads to 5 sales users such that 10 leads each are to be assigned to 3 sales users and 15 leads each are to be assigned to the remaining 2 sales users, then it is possible to do so using the user-specific lead assignment quota.

Note: The assignment quota limit for a user will apply across all automations. So, if a user's quota is defined as 10, and multiple automations are set up, leads assigned from each automation will increase the assignment quota counter. Once the quota is exceeded, more leads won't be assigned to the user from any of the automations.

User-Specific Lead Assignment Quota

Demo


leadsquared
DASHBOARD
CONTENT
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APPS
REPORTS
Settings
Search Settings
Profile
Users and Permissions
Security
Accounts
Leads
Mobile App
Lead Tracking
Lead Prioritization
Email Settings
Rules and Notifications
API and Webhooks
Data Protection & Privacy
Personal Settings
My Profile
My Password
My Email Signature
My Report Subscriptions
My Leaves
Organization Settings
Company Profile
Custom Logo
Request History
Advanced Configuration
Billing and Usage
My Profile
Manage your personal profile
Vir Singh
virkdsingh@gmail.com
Administrator
Personal Details
Edit
First Name
Vir
Last Name
Singh
Date Of Birth
Email Address
virkdsingh@gmail.com
Role
Administrator
Designation
-
Manager
-
Old Team
-

Supporting Multiple Lead Fields in Lead Update Trigger

Feature Overview

- Now you can select multiple **Lead Fields** as a **Lead Update Trigger** in the same automation

- It enables you to create a single automation that can be triggered on multiple **Lead Field** updates

Supporting Multiple Lead Fields in Lead Update Trigger

Value Proposition

- Covers multiple **Lead Field** Update triggers within the same automation
- Reduces the number of similar automations required for the same business logic
- Saves time and effort required in setting up multiple similar automations

Supporting Multiple Lead Fields in Lead Update Trigger

Business Use-case

- Create a single automation that sends the lead owner an email when-
  - the lead stage changes from prospect to customer or
  - when the lead's score reaches above 50 or
  - when the lead's location changes

Note: The maximum number of Lead Fields that can be included in the Lead Update Trigger in a single automation is 30.

Supporting Multiple Lead Fields in Lead Update Trigger

Demo

leadsquared

leadsquared DASHBOARD CONTENT MARKETING LEADS WORKFLOW APPS REPORTS

Automation

Search Automation

+ Create Automation

Type: All | Status: All | Modified By: Any | Modified On: All Time

Name	Type	Unique Record Count	Trigger Count	Last Published On	Status	Modified On	Modified By	Actions
Automation_27	Lead Created	0	0	06/04/2021	Published	06/04/2021	Abhinav Admin	
Automation_16	Lead Added To List	18	18	23/02/2021	Unpublished	05/04/2021	Abhinav Admin	
Automation_14	Lead Created	0	0	19/02/2021	Unpublished	24/02/2021	Abhinav Admin	
Automation_15	Sub Automation	0	0	19/02/2021	Unpublished	06/04/2021	Abhinav Admin	
RC Call Trigger	Activity Added	1	1	12/02/2021	Unpublished	12/02/2021	Abhinav Admin	
Automation_8	Lead Created	3	3	08/02/2021	Unpublished	08/02/2021	Abhinav Admin	
Automation_Lapp	Lead Created	6	6	22/01/2021	Published	22/01/2021	Abhinav Admin	
Automation_webhook	Lead Created	7	7	21/01/2021	Published	19/02/2021	Abhinav Admin	
Automation_2	Activity Added	0	0		Draft	08/02/2021	Abhinav Admin	
...omation_7	On WorkDay Start	0	0		Draft	08/02/2021	Abhinav Admin	

Related Settings

- Manage Lists
- Manage Custom Fields
- Manage Custom Activities
- Manage Lead Assignment Quota
- Automation Failure Report

Supporting Multiple Task types in Task-related Trigger on Lead

Feature Overview

- Now you can select multiple **Task Type** for a Task-related Trigger on lead in the same automation

- For example, select multiple Task Types in automations that have either of the following Task Triggers on Lead-
  - Task Created on Lead
  - Task Reminder for Lead
  - Task Completed on Lead

Supporting Multiple Task types in Task-related Trigger on Lead

Value Proposition

- Covers multiple **Task Type** triggers within the same automation
- Reduces the number of similar automations required to complete the same business logic
- Saves time and effort required in setting up multiple automations of similar type

Supporting Multiple Task types in Task-related Trigger on Lead

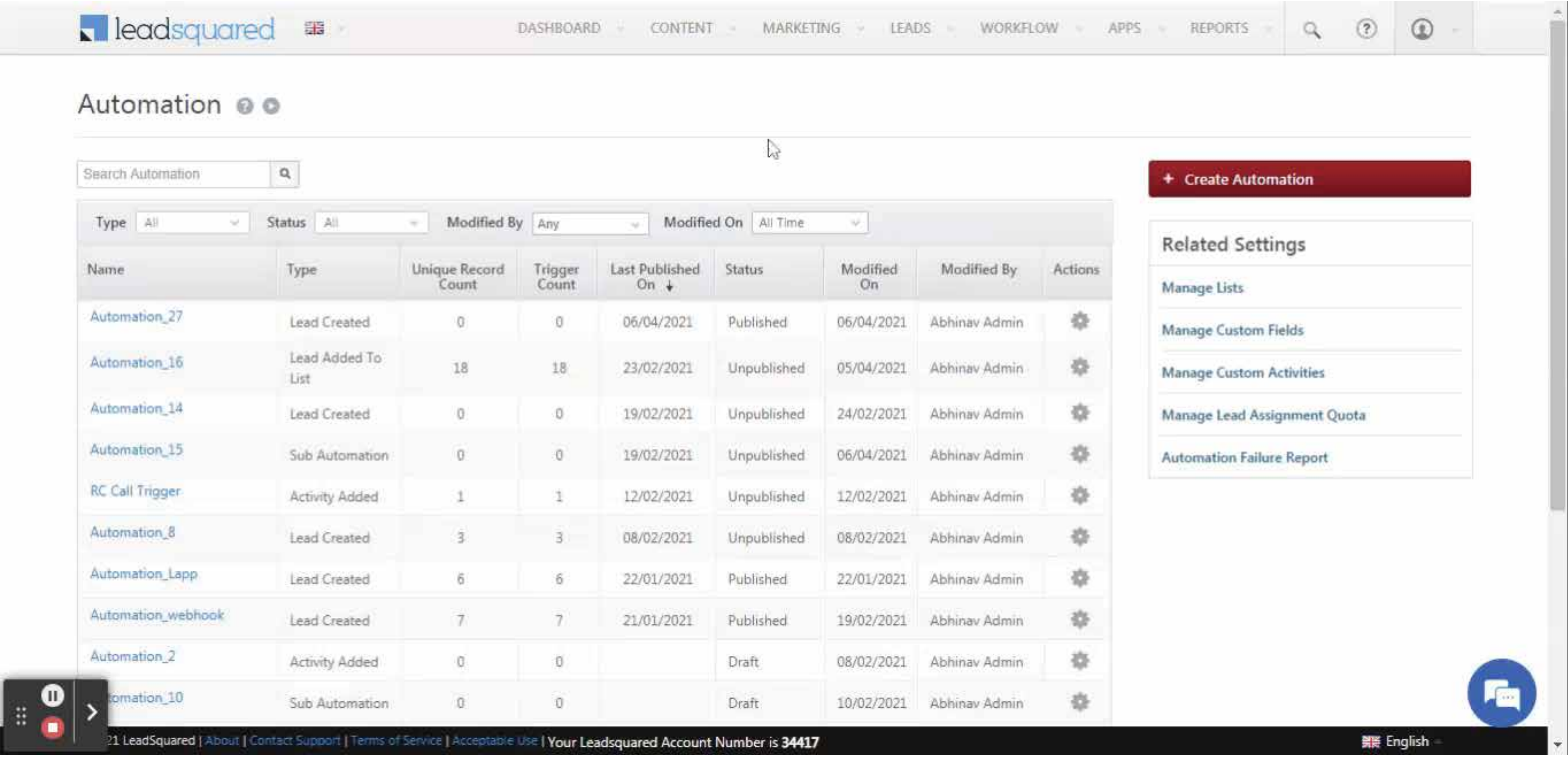
Business Use-case

- You can create a single automation that creates tasks for members of a different team once specific tasks are completed by the sales team.

- For example, create a follow-up task for the accounts team when the sales team completes **Task Type 1** or create an activity on the lead when the sales team completes **Task Type 2** on the lead.

Supporting Multiple Task types in Task-related Trigger on Lead

Demo



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Automation_2	Activity Added	0	0		Draft	08/02/2021	Abhinav Admin	
tomation_10	Sub Automation	0	0		Draft	10/02/2021	Abhinav Admin	

Work-hours based Automation (Wait Until Workday condition card)

Feature Overview

- Now you can assign work to users only on their workdays.

- The automation execution will wait till a particular user (Lead Owner/Activity Owner/Opportunity Owner) is online before proceeding with actions such as creating a task, sending notification, etc. for the user. This ensures the owner does not miss out on important notifications, updates or action items.

Work-hours based Automation (Wait Until Workday condition card)

Value Proposition

- It enables users to schedule any action for next available workday incase it falls outside of working hours
- This ensures that users are assigned work only when they log-in to work
- Prevents unnecessary re-assignment of tasks because of unavailability of users

Work-hours based Automation (Wait Until Workday condition card)

Business Use-case

- When a new lead is created and allocated to a user who's currently offline, send a notification to the user only after the user logs in to work.
- Delay the automation execution till the Lead /Activity /Opportunity Owner is online and then proceed with creating a task for the Owner.

Work-hours based Automation (Wait Until Workday condition card)

Demo

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Automation

Search Automation

+ Create Automation

Type All | Status All | Modified By Any | Modified On All Time

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Related Settings

- Manage Lists
- Manage Custom Fields
- Manage Custom Activities
- Manage Lead Assignment Quota
- Automation Failure Report

21 LeadSquared | About | Contact Support | Terms of Service | Acceptable Use | Your Leadsquared Account Number is **34417**

English

New Task Triggers for Opportunity Management

Feature Overview

- Now you can create automations with **Task Triggers** for **Opportunity Management**.

- New triggers that have been added are-
  - Task Created on Opportunity
  - Task Completed on Opportunity
  - Task Reminder for Opportunity

New Task Triggers for Opportunity Management

Value Proposition

- Ease of use in creating Opportunity Task Trigger related automations.
- Provides more flexibility to users who use opportunity management extensively.

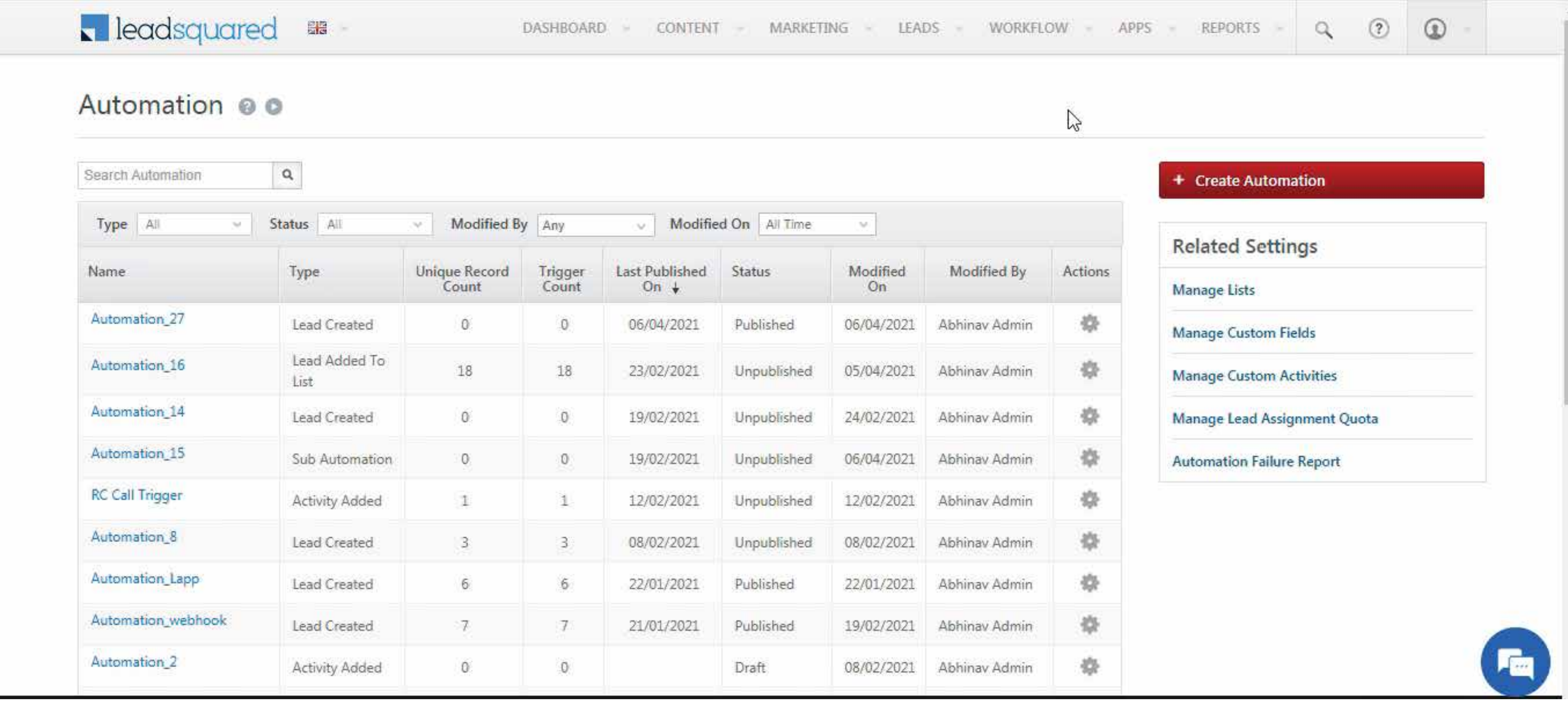
New Task Triggers for Opportunity Management

Business Use-case

- Send emails to users reminding them to collect documents related to an opportunity.
- Notify users with a personalized email when an appointment is scheduled with a lead connected with an opportunity.
- Create a follow-up task for the accounts team when an opportunity related task is completed by the sales team.

New Task Triggers for Opportunity Management

Demo



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Automation_16	Lead Added To List	18	18	23/02/2021	Unpublished	05/04/2021	Abhinav Admin	
Automation_14	Lead Created	0	0	19/02/2021	Unpublished	24/02/2021	Abhinav Admin	
Automation_15	Sub Automation	0	0	19/02/2021	Unpublished	06/04/2021	Abhinav Admin	
RC Call Trigger	Activity Added	1	1	12/02/2021	Unpublished	12/02/2021	Abhinav Admin	
Automation_8	Lead Created	3	3	08/02/2021	Unpublished	08/02/2021	Abhinav Admin	
Automation_Lapp	Lead Created	6	6	22/01/2021	Published	22/01/2021	Abhinav Admin	
Automation_webhook	Lead Created	7	7	21/01/2021	Published	19/02/2021	Abhinav Admin	
Automation_2	Activity Added	0	0		Draft	08/02/2021	Abhinav Admin	

Supporting Automation Trigger on Bulk Opportunity Import and Update

Feature Overview

- Now you can trigger an automation when-
  - Opportunities are imported in Bulk through the CSV file
  - Opportunities are updated using Bulk Update on the Manage Opportunities page

Supporting Automation Trigger on Bulk Opportunity Import and Update

Value Proposition

- Makes it easy for users to trigger automations especially those who use opportunity management extensively.

- It is very useful especially in cases where
  - Users have to trigger an automation immediately after opportunities are imported in bulk using the CSV file or
  - Users have to trigger automations on Bulk Opportunity Update from the platform

Supporting Automation Trigger on Bulk Opportunity Import and Update

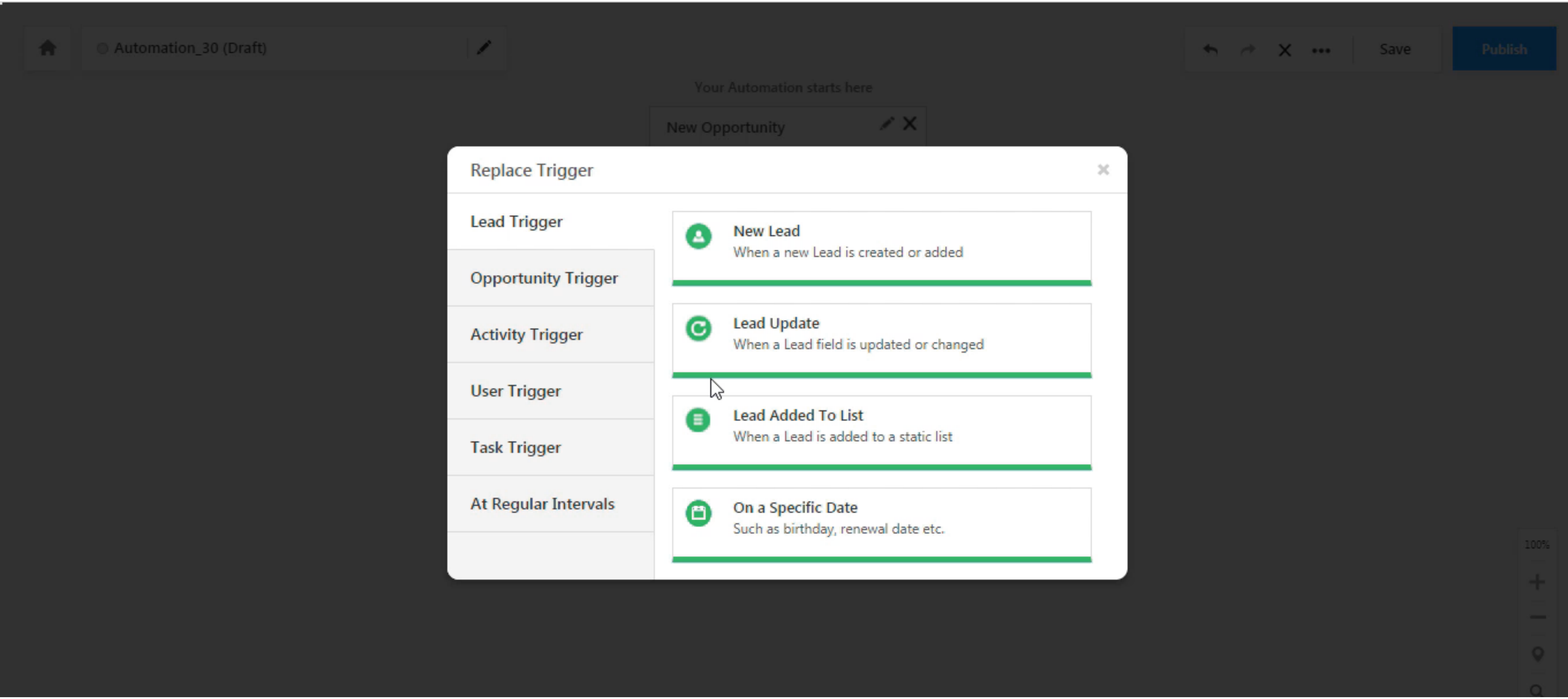
Business Use-case

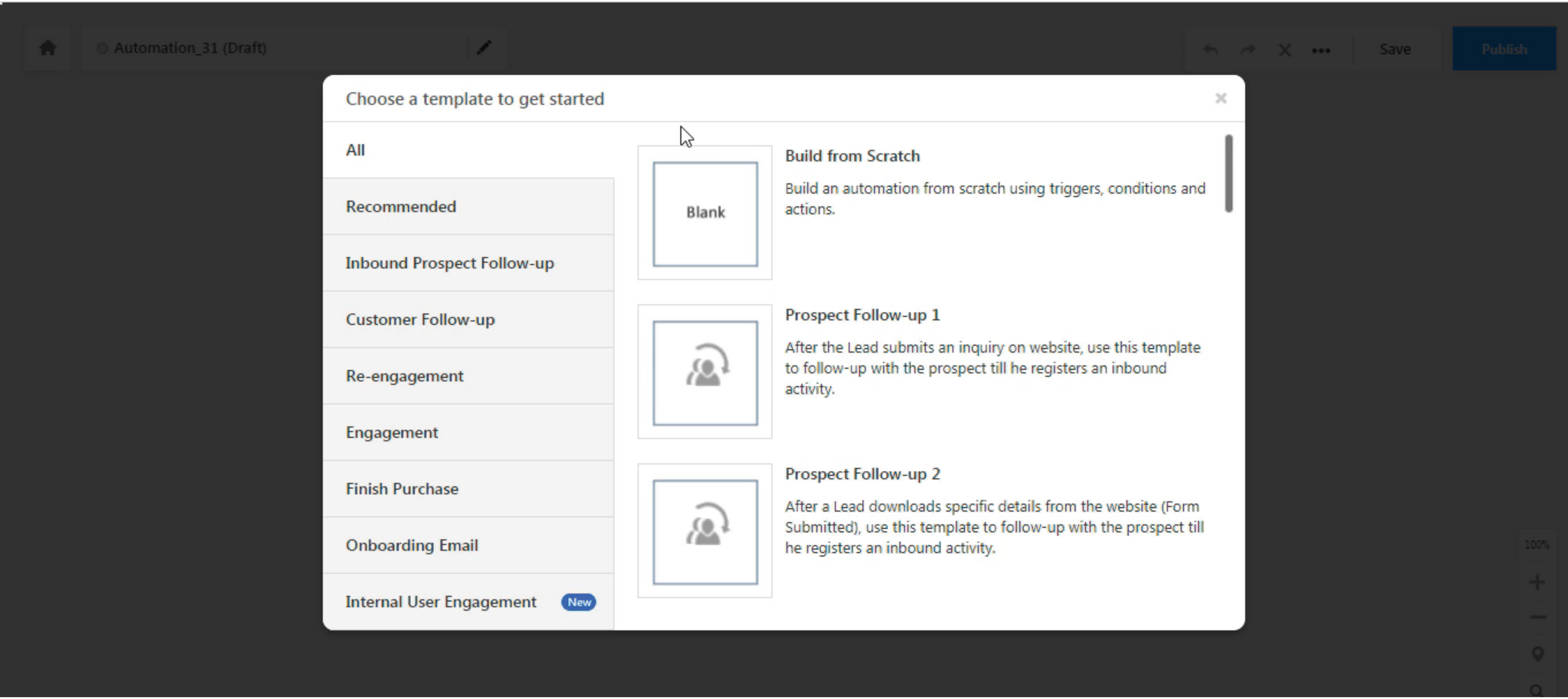
- An insurance company wants to trigger an automation immediately after importing multiple vehicle insurance type opportunities.

- The same insurance company wants to trigger another automation when an opportunity field is updated in Bulk for multiple opportunities.

Supporting Automation Trigger on Bulk Opportunity Import and Update

Demo


Automation_30 (Draft)
Save
Publish
Your Automation starts here
New Opportunity
Replace Trigger
Lead Trigger
Opportunity Trigger
Activity Trigger
User Trigger
Task Trigger
At Regular Intervals
New Lead
When a new Lead is created or added
Lead Update
When a Lead field is updated or changed
Lead Added To List
When a Lead is added to a static list
On a Specific Date
Such as birthday, renewal date etc.



Automation_31 (Draft)
Save
Publish
Choose a template to get started
All
Recommended
Inbound Prospect Follow-up
Customer Follow-up
Re-engagement
Engagement
Finish Purchase
Onboarding Email
Internal User Engagement
New
Blank
Build from Scratch
Build an automation from scratch using triggers, conditions and actions.
Prospect Follow-up 1
After the Lead submits an inquiry on website, use this template to follow-up with the prospect till he registers an inbound activity.
Prospect Follow-up 2
After a Lead downloads specific details from the website (Form Submitted), use this template to follow-up with the prospect till he registers an inbound activity.

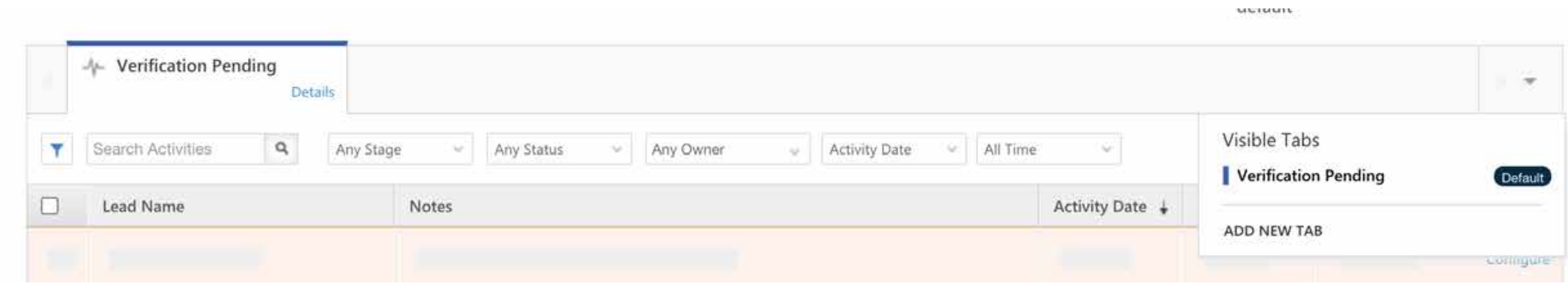
Smart Views and Forms
Webinar Updates

- G Suryateja

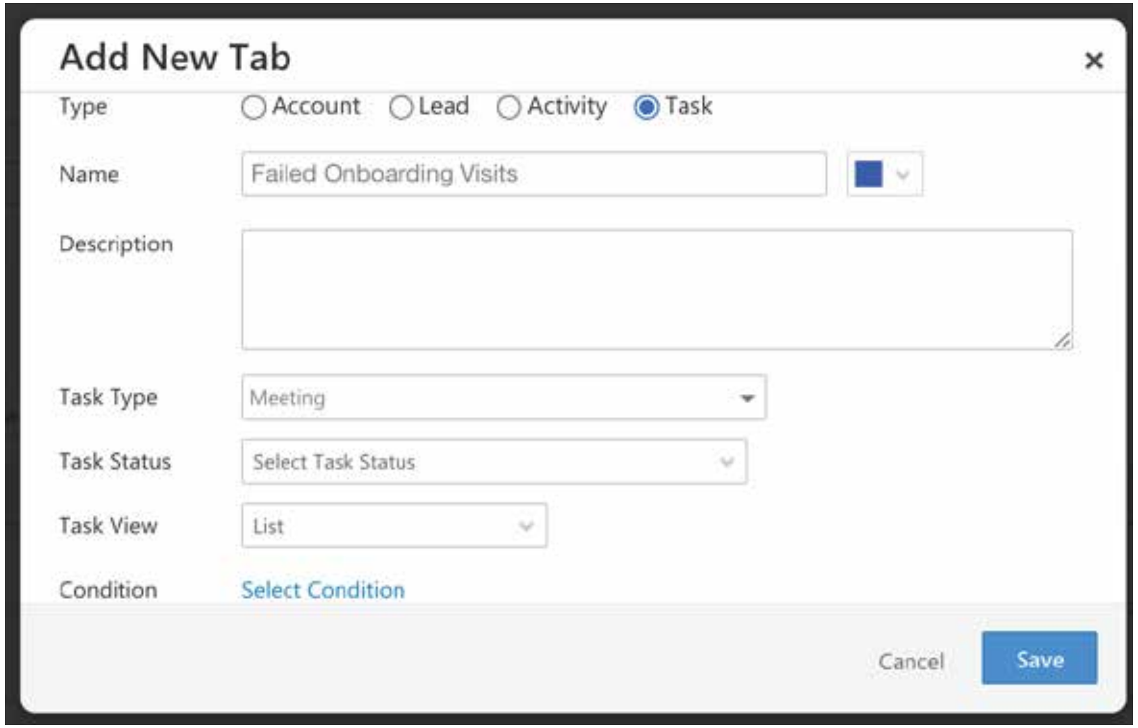
Smartviews

- List view based on specific conditions on Leadsquared Entities
- Introducing Tasks Advanced Search (Settings > Accounts > Smart Views)
  - Filter with extensive conditions
    - Define as per requirements
  - Filter tasks based on Lead Fields
    - Combine with Lead Stage, Status and more
  - Multi Select Task Status field for better analysis
    - Understand completion rates, and combine overdue and pending

Smartviews

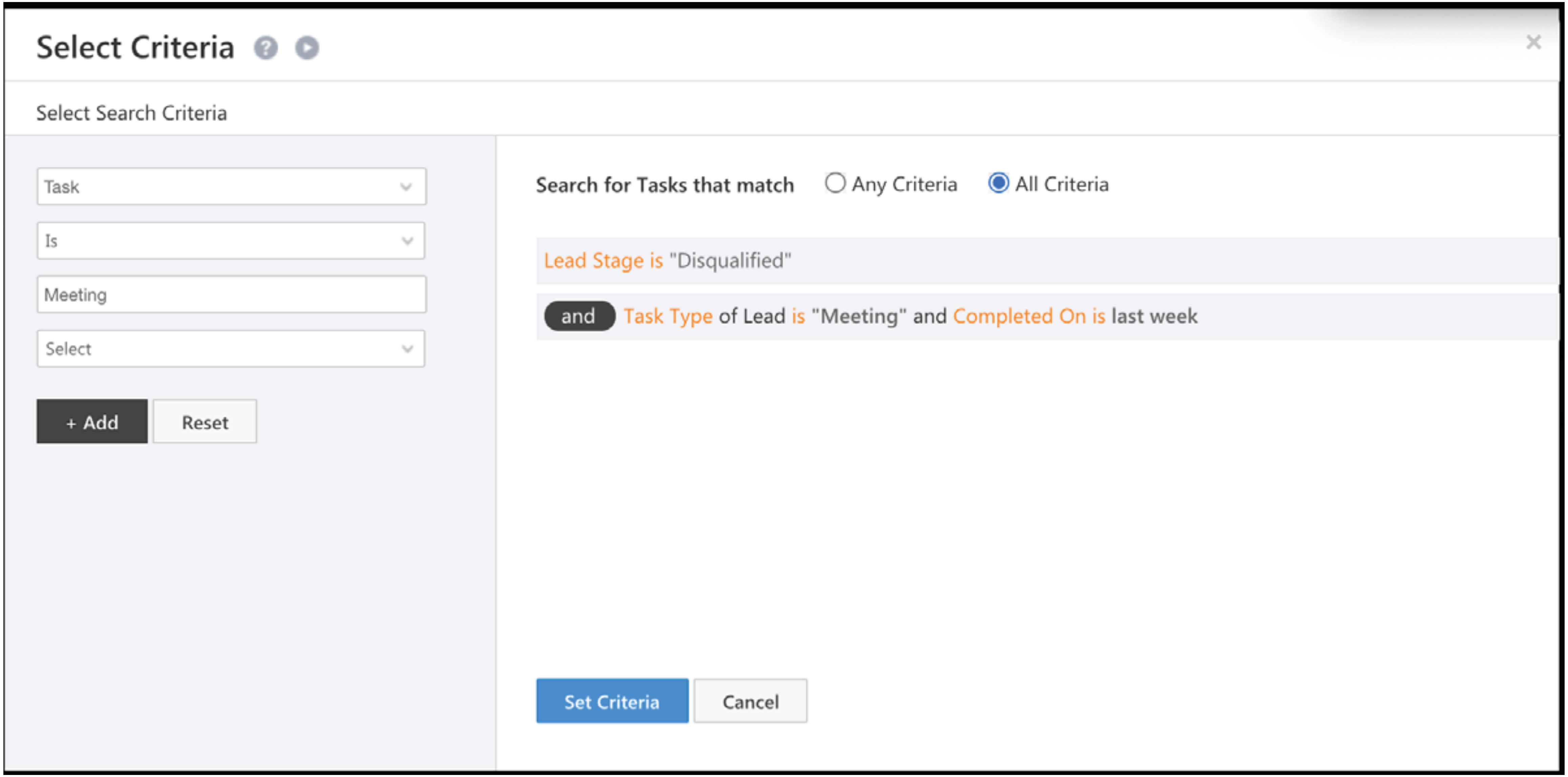


Verification Pending
Details
Search Activities
Any Stage
Any Status
Any Owner
Activity Date
All Time
Lead Name
Notes
Activity Date
Visible Tabs
Verification Pending
Default
ADD NEW TAB



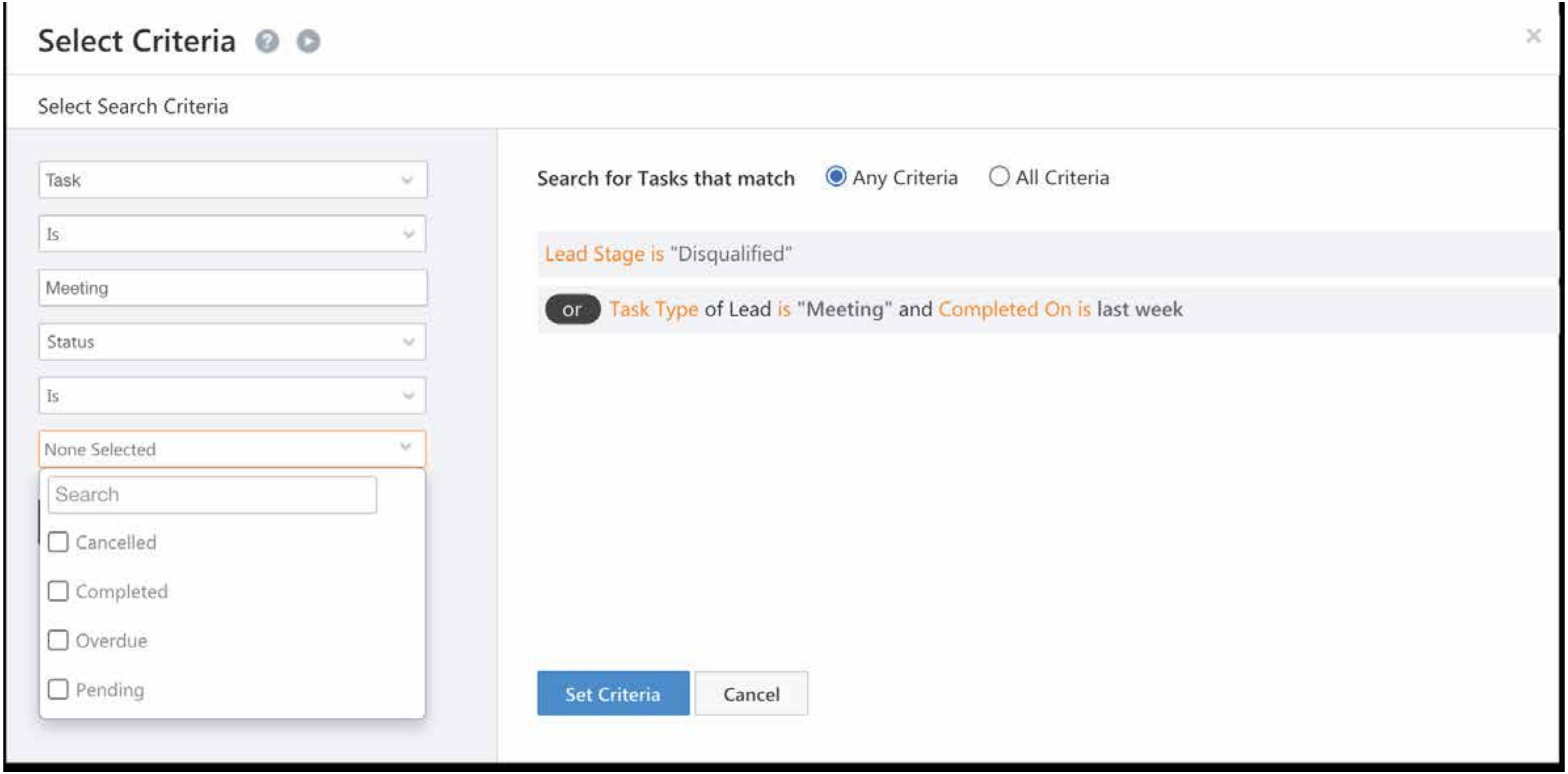
Add New Tab
Type
Account
Lead
Activity
Task
Name
Failed Onboarding Visits
Description
Task Type
Meeting
Task Status
Select Task Status
Task View
List
Condition
Select Condition
Cancel
Save

Smartviews



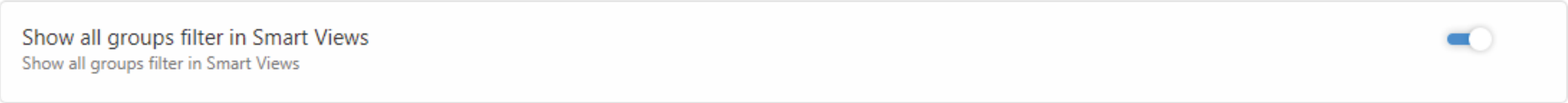
Select Criteria
Select Search Criteria
Task
Is
Meeting
Select
+ Add
Reset
Search for Tasks that match
Any Criteria
All Criteria
Lead Stage is "Disqualified"
and Task Type of Lead is "Meeting" and Completed On is last week
Set Criteria
Cancel

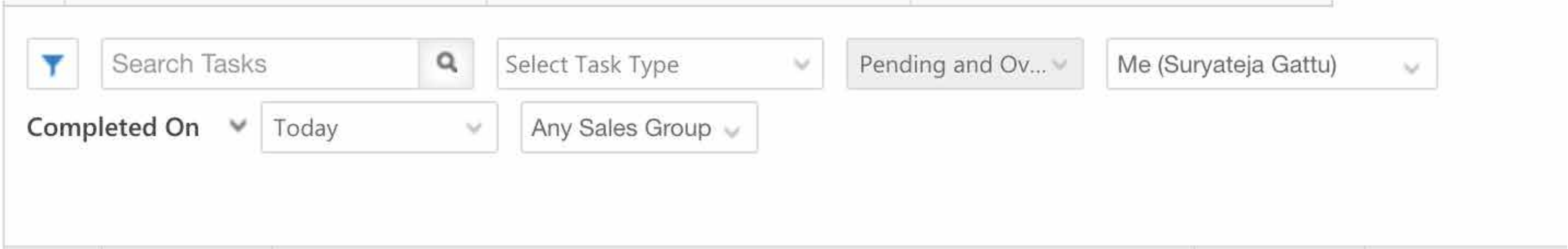
Smartviews


Select Criteria
Select Search Criteria
Task
Is
Meeting
Status
Is
None Selected
Search
Cancelled
Completed
Overdue
Pending
Search for Tasks that match
Any Criteria
All Criteria
Lead Stage is "Disqualified"
or
Task Type of Lead is "Meeting" and Completed On is last week
Set Criteria
Cancel

Smartviews

- Sales Group Filters
  - Deep dive into performance by groups



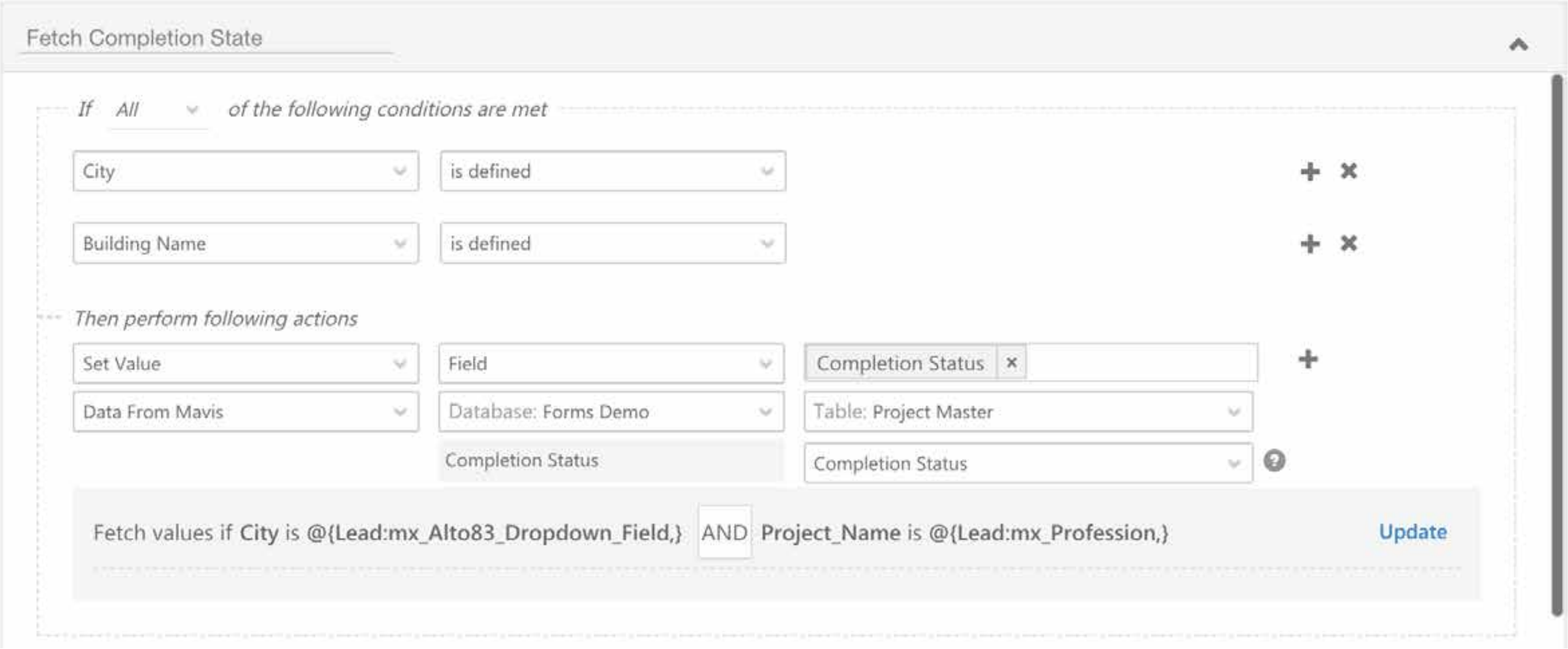


Forms and Process

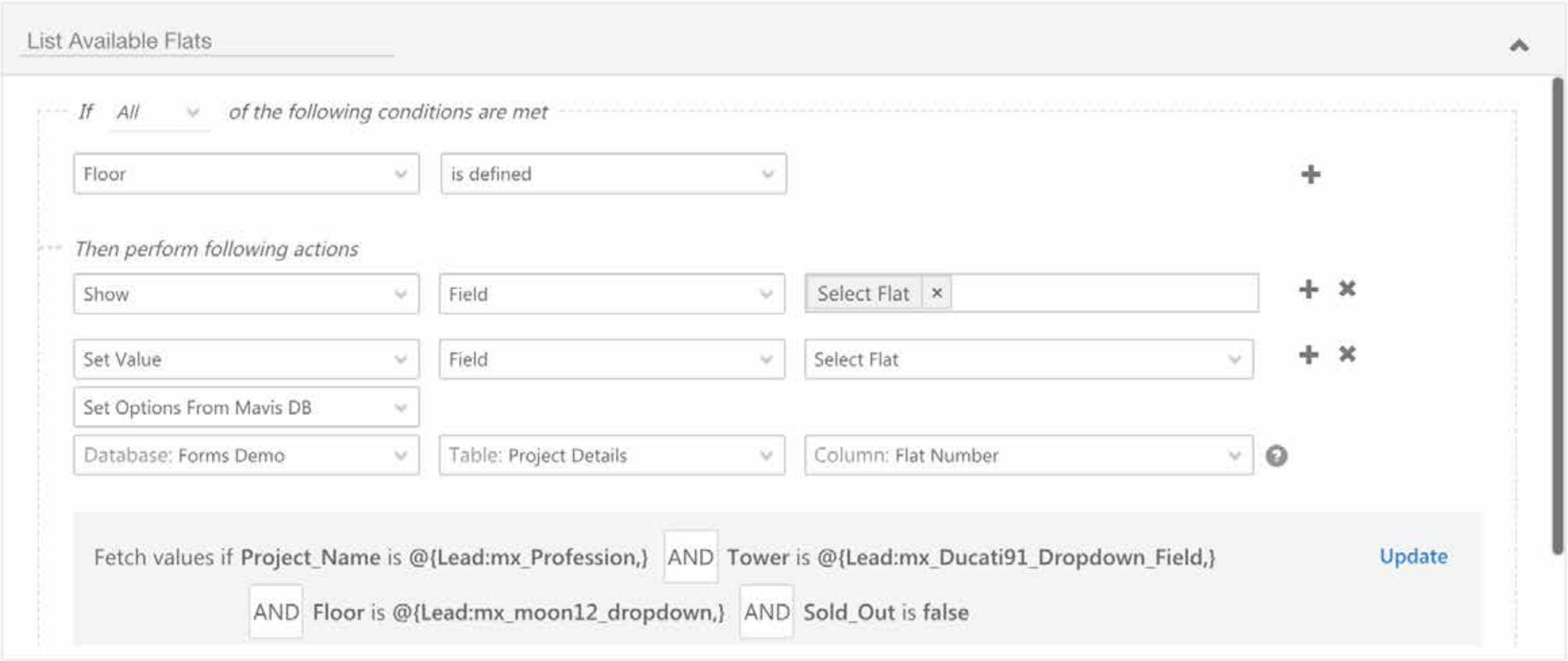
General

- Form load and save performance improvements
- Dependent Dropdown Rules
- Mavisdb Native Support in Forms
  - Mavisdb is a new Database as a Service (DasS) from Leadsquared
  - Store business data securely and use directly
  - Forms supports
    - Data from Mavisdb
    - Set Options from Mavisdb

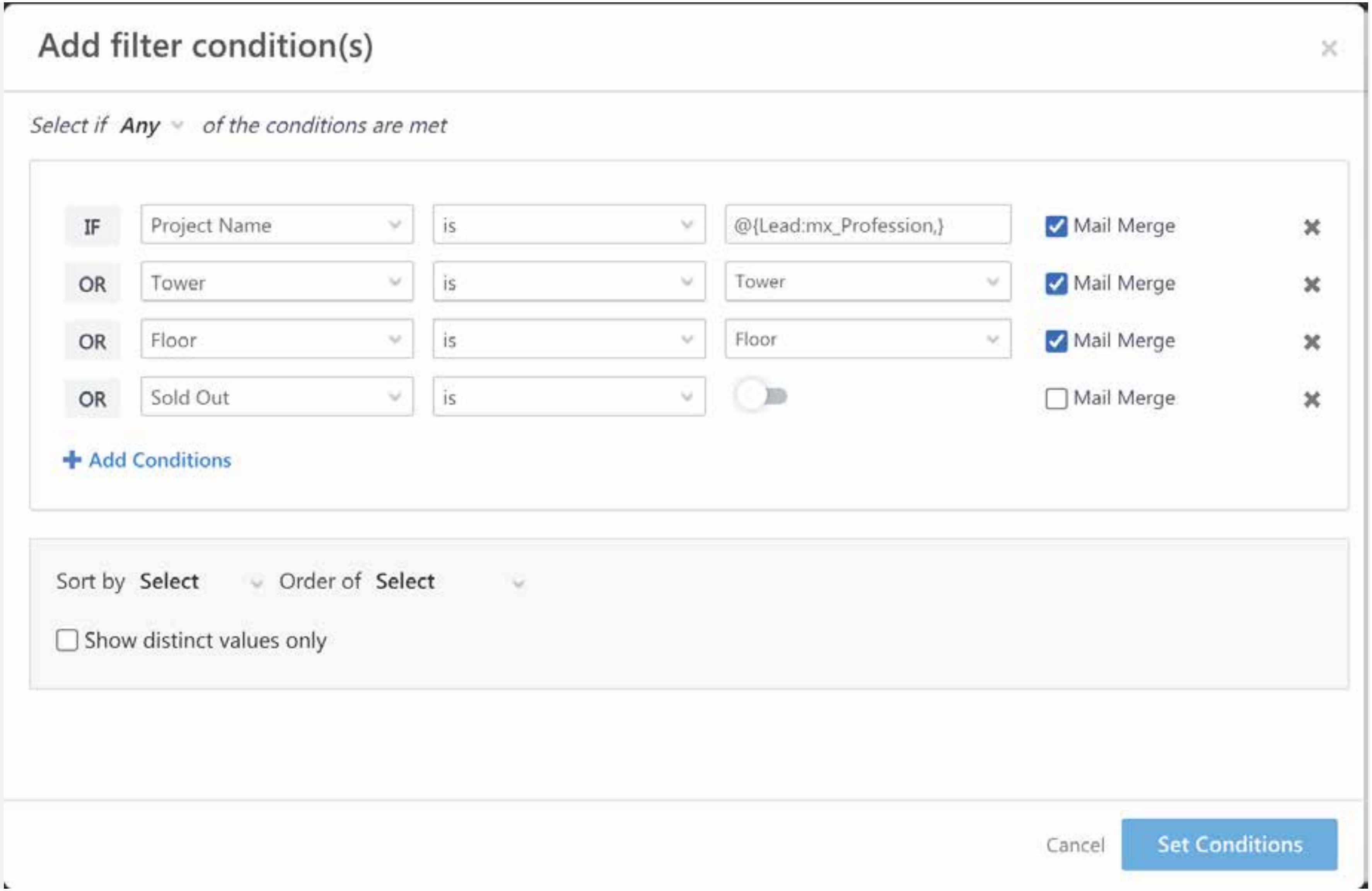
Forms and Process



Forms and Process



Forms and Process



Forms and Process

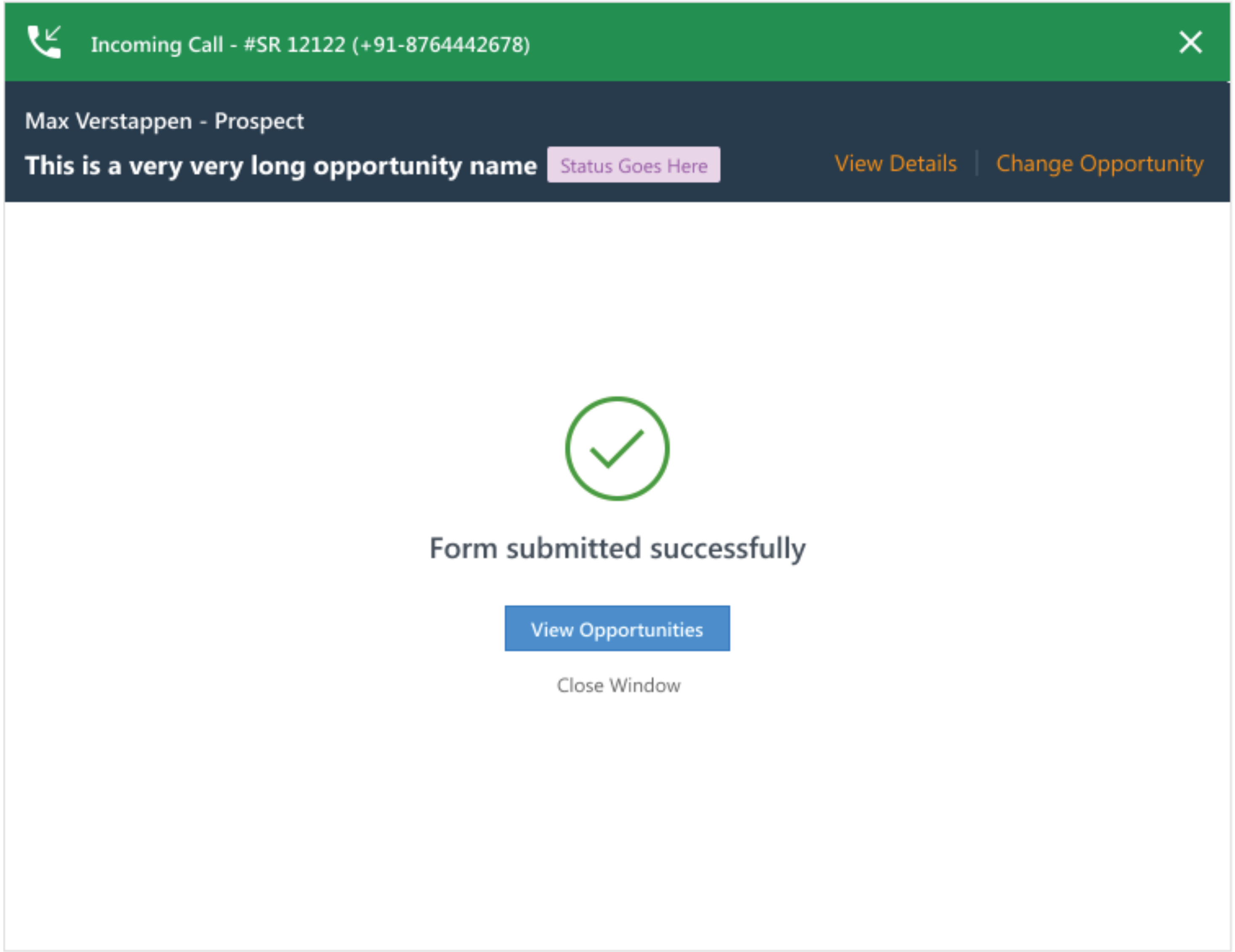
Payments

- New Payment Gateway – Payfast
- Custom Params in Payment

Agent Pop Up

- Agent Pop up supports upsell and cross opportunities

Forms and Process



Forms and Process

UX Improvements

- Rich text field labels
- Rendering Dropdowns as Checkboxes and Radio Buttons
- Rename Process button in Lead Details page

Forms and Process

Field Properties

Display Name

Is the Lead interested in **ANY** of the following plans

Content

The price of the plans <u>can be modified</u> and <u>not fixed</u>, please talk to your manager for the discounts that can be offered.

Render as

Check Boxes

Render as Options Limit

8

Default Value

b

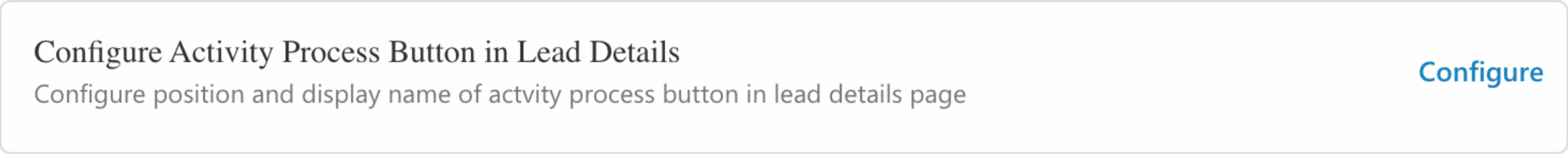
Plans the Lead is interested in

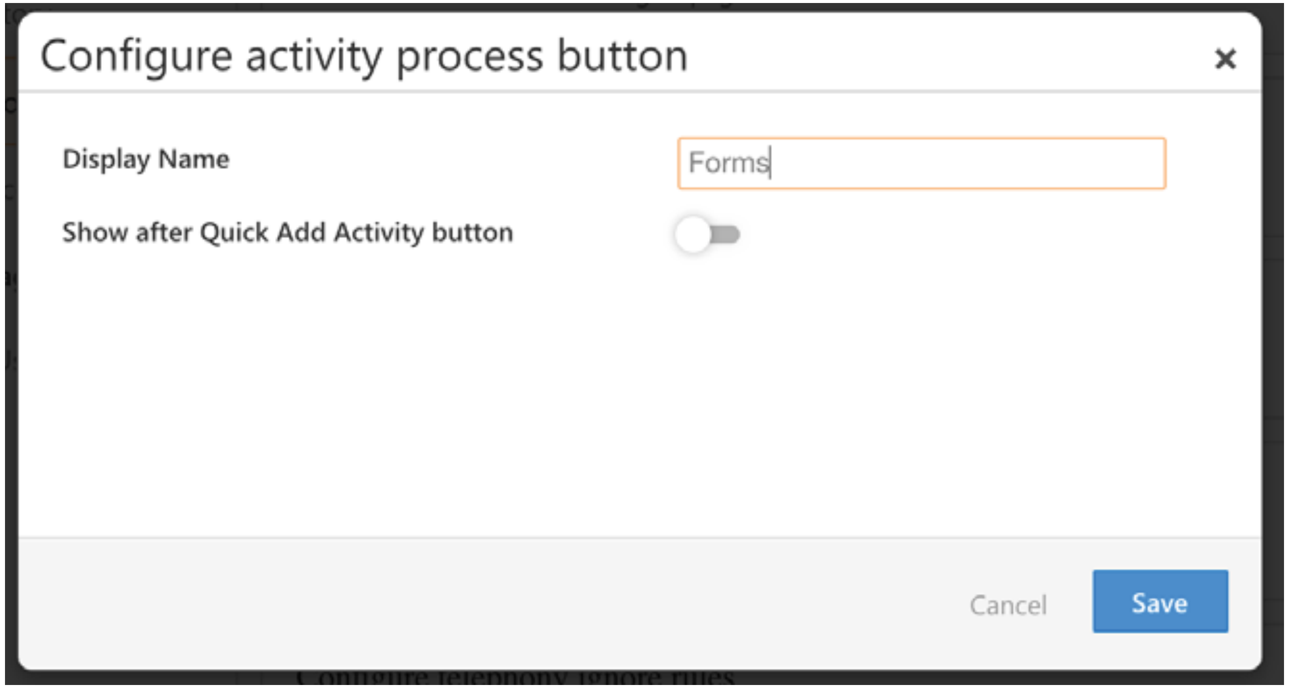
- [ ] a
- [x] b
- [ ] c
- [ ] d
- [ ] e
- [ ] f

Forms and Process

UX Improvements

- Rename Process button in Lead Details page





Thank You!
We'll see you next session.

leadsquared

Land More Leads, Close More Deals

TIPS

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