Sending a Business Name / URL Qualification Email

* + 1. Login to Dynamics CRM
    2. Go to Marketing > Leads
    3. Go to the lead record
    4. Under the “Lead to Opportunity Sales…” bar click “Related”
    5. A picture containing graphical user interface

       Description automatically generated
    6. Under “Related: Common” click “Activities”
    7. Graphical user interface, application

       Description automatically generated
    8. Click the arrow for the “New Activity” drop menu
    9. Graphical user interface, application

       Description automatically generated
    10. Select “Email”
    11. From here, use the following information:
  1. Subject Line: RE: [Original Intent Form] Request – [Contact Name]
  2. Email Body:

Hi [Lead Name],

I am hoping to gather just a little more information from you in order to get you started with a [Product] [Quote/Demo/Support/Upgrade/Etc] Request. Just to clarify:

Do you have a Business Name and/or Web URL we can associate with this request?

With an answer to this question, I should be able get you in touch with the appropriate group at Advantage.

Best,

Name

Role

Email

* + 1. When ready, click “Send” on the left side of the top bar.



* + 1. Update the record in CRM with all required information including the following:
       1. Status: Contacted
       2. Rating: Cold