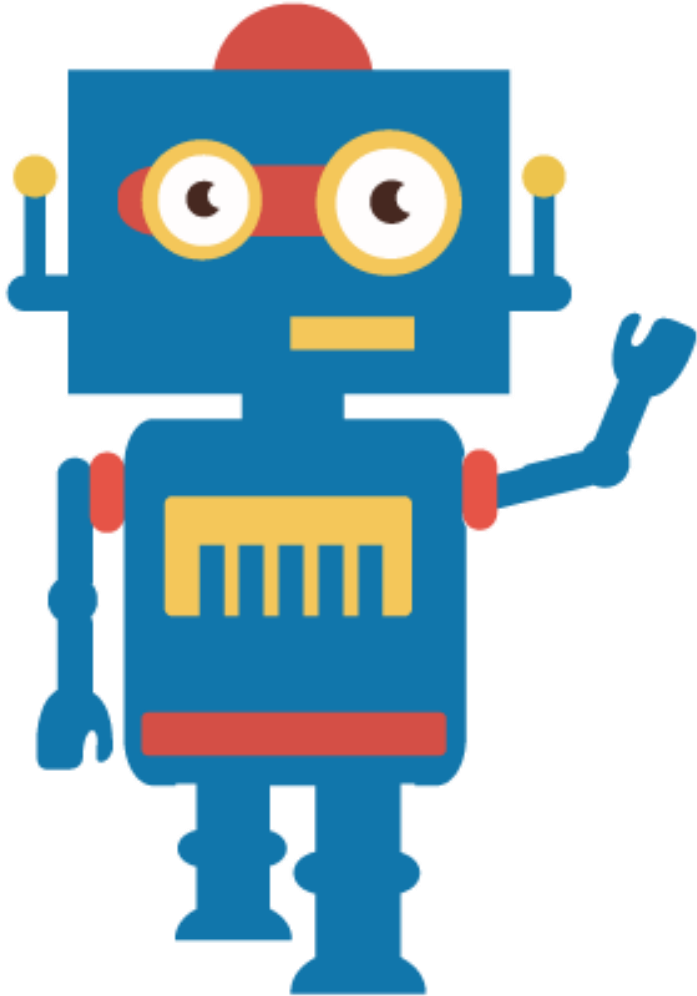




# Using Project Templates to Manage Sales and Retention

#WLSummit

# Meet the Presenters



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# Overview of Tasks and Projects

✱ Tasks and Task Types

✱ Single Project and Project Types

✱ Recurring Projects as Project Templates

# Project Templates

- ✱ Creating the right Project Types – *specific or general?*
- ✱ Adding tasks and assigning appropriately
- ✱ Due Dates and Reminder Dates
- ✱ Utilizing other task fields to your benefit

# Sales & Retention Project Templates

- ✱ Identify steps in current sales/retention process to create as tasks with timeline
- ✱ Use dashboard to stay on top of sales follow up
- ✱ Use Contact Records in conjunction with tasks
- ✱ Viewing completed tasks from Prospect/Member Profile

*Let's look at some*

**EXAMPLES**



# Sales Process Templates

- ✱ Initial communication with Prospect – *Day 1*
- ✱ Send membership information – *Day 2*
- ✱ Follow up with Prospect – *Day 9*
- ✱ Second follow up – *Day 16*
- ✱ Site visit – *Day 30*

# Retention Template

- ✱ Membership payment entered into WLC – *Day 1*
- ✱ Welcome email sent – *Day 1*
- ✱ Membership packet/plaque sent – *Day 7*
- ✱ 30 day touch – invitation to event – *Day 30*
- ✱ Month 2 touch – get involved– *Day 60*
- ✱ Month 6 touch – survey – *Day 180*
- ✱ Month 11 touch – referral report – *Day 330*
- ✱ Check for renewal, kick off year 2 project – *Day 365*



# Other Project Ideas

## Consider...

- ✂ Event projects
- ✂ Tiered membership benefits tracking
- ✂ TRC project tracking
- ✂ Other ideas?

## Reporting...

- ✂ Dashboard
- ✂ Tasks tab within Profile
- ✂ Task Selector
- ✂ Project Selector
- ✂ Standard Task/Project Reports
- ✂ DERT Queries