salesexec

Features

Capture

- Inbound Phone IVR
- Web leads integration
- Zapier marketplace

Consideration

Prioritize

- Pull Distribution
- Push Distribution
- State Calling Hours
- Lead Release Timer
- Lead Delivery Criteria
- Manually Transfer Leads
- Automated Events

Engage

- Sales Scripts
- Digital Document Signing
- Event Streams
- Email Solutions
  - Email Library
  - Email Nurture
  - Email Conversations
- Outbound Telco solution
  - Web RTC Dialer
  - Call Monitoring
  - Warm Transfer
  - Barge
  - Whisper Coaching
- Texting Solution

Purchase

Compliance & Security

- DNC List Management
- Duplicate and Append
- GDPR

Retention, Service, Loyalty

Report

- Customizable Reporting Dashboard
- Customized Scoreboard Reports
- Out-of-the-Box Reports

Admin

- Customize User Screens, Options
- Manage Users and Roles
- Lead Stages and Pipeline
- Lead Import/Export
- Workflow and Segmentation
- API

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Capture

Inbound IVR

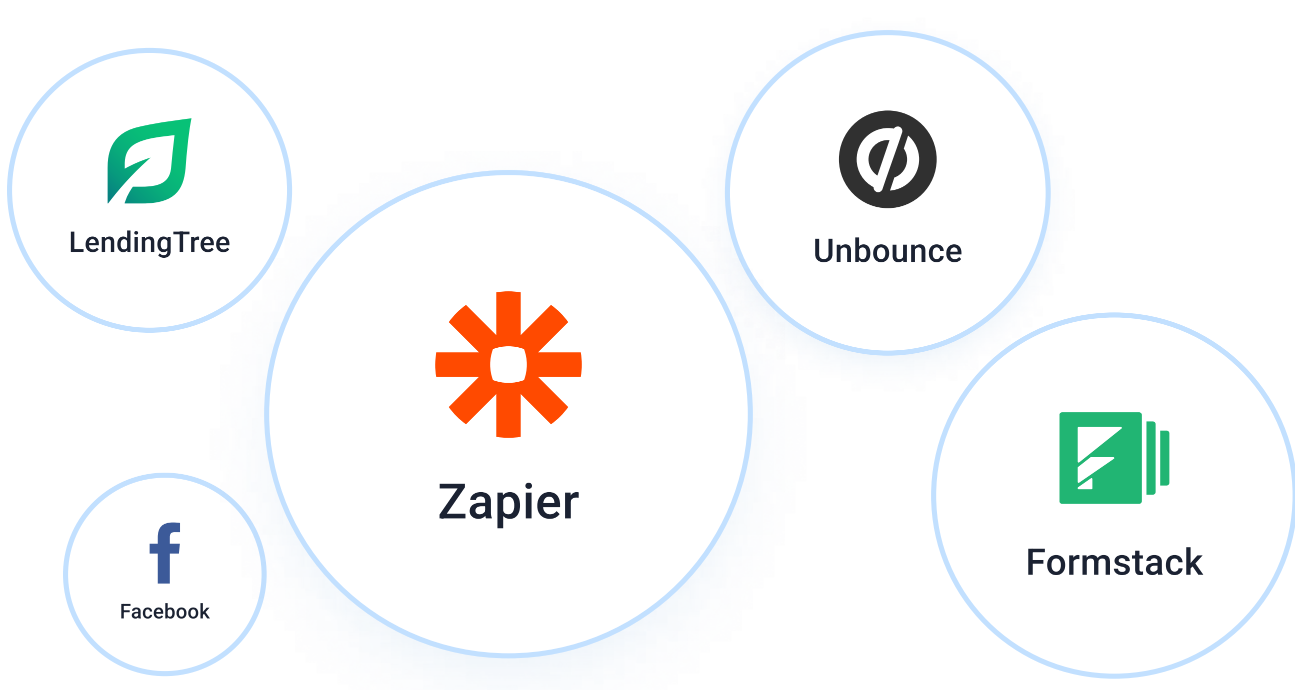
You can purchase 1-800 or local numbers, and program call flows to direct inbound calls to team members, branch locations, or outside call centers. SalesExec can record and route the calls based on rules like round-robin or shotgun.

Web Leads Integration

Create segmentation and tracking for each lead channel, source, and campaign. Once you have done this, you can generate the necessary documentation to integrate your website or provide it to any third-party lead source so that leads can be sent electronically to your account and routed to your salespeople or branch locations.

Zapier Marketplace

SalesExec is in the Zapier marketplace so you can set up Zaps from Facebook forms or any other applications found in the marketplace. This makes it easy to get leads flowing from various marketing solutions.



Prioritize

Pull Distribution

A customizable lead distribution that can set criteria (rules) for users to pull leads from a queue of leads in any sales workflow or bucket. This strategy is based on the lean methodology and sets SalesExec apart from every other solution that caters to leads.

Push Distribution

Push Distributions optimize lead delivery by delivering leads to users and allowing the user to attempt to contact each lead. Push improves the volume of leads a user can contact efficiently, making it possible to add appointments, notes, and disposition the lead to mark the accurate placement of the lead in the sales workflow. Push strategies include criteria-based routing, round-robin, and shotgun. Criteria for delivery are specific to the lead type and can include lead fields like state, country, loan type, quote type, product type, and more.

You can set callable state hours, DNC options, and lead calling rules from the administration screen. The user is provided with a simplified Pull screen that utilizes a WebRTC phone solution to initiate a call when a salesperson requests a lead. Pull enables more efficient dialing for large sales teams by eliminating the need for salespeople to attempt to contact leads manually. It also ensures each lead will be contacted the optimal number of times before moving the lead to an email nurture campaign.

State Calling Hours

State calling hours are critical to ensure that your sales teams do not call into states after late-night calling restrictions. SalesExec will help enable state hours to ensure your team complies with the FTC terms.

Lead Release Timer

A release timer is a feature that works with Pull and Push to release ownership of a lead from a user back to either a calling queue or redistribution. If a user is not effective in moving the lead to a critical sales step, releasing the lead gives another user a shot at converting the lead.

Lead Delivery Criteria

Lead criteria are used for lead sources and distribution. When purchasing leads from third-party providers, they must send leads that follow your desired format and requirements. If you request leads in a particular state, you would not want to accept leads outside of that area; lead criteria prevent this.

Automated Events

An Automated Event allows you to create special events that trigger based on a lead's type, action, and status. This feature allows additional types of email nurturing for your leads, such as redistribution after certain events, sending leads to third-party systems, or changing the status based on event type.

Manually Transfer Leads

Administrators can transfer leads from a branch to another branch, from a user to another user, or from a territory manager. Administrators can manually move and transfer leads instantly.

Engage

Sales Scripts

The sales script is used on the lead pull page. It is dynamic, meaning an administrator can create a decision tree that loads customized script language when various keys are selected. You can inject text into various script parts based on lead field information.

Digital Document Signing

With a turn-key integration with Adobe Sign, you can send contracts directly to your potential customers, get status updates, and take action on leads who have not completed their contracts.

Event Streams

Help your salespeople make the right decisions with a heads-up display, showing them when leads reply to text marketing, emails, or calls.

Email Solutions

Email Library

Create an email library for your teams to track lifetime performance for email send information, opens, clicks, and replies. Create tags to categorize your emails and add them to nurture campaigns.

Email Nurture

Create sequences where emails and text messages are sent instantly based on specific activities happening in SalesExec.

Email Conversations

Track email replies on each lead so your salespeople know exactly what was said during their last exchange with a potential customer.

Call Monitoring

With a heads-up display, you can see which of your salespeople are on the phone or next in line to receive a call and assist them with their sales calls using either barge or whisper coaching.

Warm Transfer

With this feature, call center agents, business development reps, or pre-screen agents can warm transfer calls to entire teams or individuals within the business.

WebRTC Dialer

SalesExec Power Dialer initiates a call in a sequence only when a user specifies and requests an outbound dial. This feature works with TCPA compliance rules to ensure users are dictating call requests and not automated by the system. The WebRTC functionality means you can use our phone solution without hardware; simply plug a headset into a computer to initiate calling capabilities.

Barge

When monitoring a call with a salesperson, you may find that taking over the call or assisting live can help save the sale; you can do this easily with a barge.

Whisper Coaching

Coaching salespeople without the customer hearing your specific coaching. This feature helps managers train salespeople.

Administration

Customize User Screens, Options

Administrators can configure the agent screens and layout with a drag-and-drop designer. They can also customize the lead field order and view for users.

Manage Users & Roles

Add and remove users and lock down remote users with an IP restriction. Administrators can create various roles for users and administrators that include permission levels. For example, you might have a manager who should have access to a branch but not all branches. With user roles, you can create a branch manager role, which would assign permissions to this specific type of user.

Workflow and Segmentation

SalesExec allows you to segment your leads into subcategories within the lead type, where the lead resides in the sales cycle (lead, client, sold, dead, etc.). Each sales workflow contains status, actions, and automated and manual lead routing to move leads forward or backward through the sales process.

Lead Stages and Pipeline

Administrators and users can edit the pipeline with the expected close date and probability of closing percentage. Administrators can also add products associated with the pipeline.

API

SalesExec features a self-documenting REST API found here: REST API. REST stands for Representational State Transfer (sometimes spelled "ReST"). It relies on a stateless, client-server, cacheable communications protocol; the HTTP protocol is used in virtually all cases. REST is an architecture style for designing networked applications.

Lead Import/Export

Administrators can import lead lists into SalesExec and then transfer the leads to various branches or users. Administrators can also export entire lead lists from different lead types and workflows.

Reporting

Customizable Reporting Dashboard

SalesExec dashboard allows administrators or users to create dashboard reports based on any time range, criteria, and specified tile size. Once you have created a reporting tile, you can share the layout with anyone in the company that has an active license. here are many pre-built tiles to choose from that can be edited to meet your needs.

Customized Scoreboard Reports

Scoreboard Reports are designed to be visual aids that help prioritize the metrics you would like your sales team to improve. You can customize these reports to cycle through slides, change the background image or video, and change the metrics.

Out-of-the-Box Reports

Many out-of-the-box reports help administrators understand how lead sources or salespeople are performing.

Compliance and Security

DNC List Management

Administrators can create access to a DNC portal and acceptable DNC types. Available DNC types include Do Not Mail, Do Not Phone, Do Note Email, and Do Not Knock. Users added to the DNC for Do Not Phone or Do Not Email are restricted from being called or emailed within SalesExec. SalesExec also provides the ability to request DNC updates via the REST API.

Duplicate and Append

Check for duplicates based on any information field found on a lead. You can append new information on a particular lead if a duplicate is valid.

GDPR

Create your own GDPR policies and have data removed in accordance with that policy.