

Are you still using
spreadsheets to manage
your sales leads? 🙄

Save time, avoid mistakes & make room for growth by
AUTOMATING your lead management process

Spreadsheets CAN'T handle 100,000s of leads

- ✗ It's SO time consuming
- ✗ It's difficult to manage leads manually
- ✗ There's a risk of human error
- ✗ They break
- ✗ They're not automated!

	A	B	C	D
1	Name	Age	Source	Next
2	James	27	—	Call on...
3	Mike Ger...		Ref 34	Needs...
4	Jo Swans...	136	TODO	---
5	Emma Bri...	47	RTY	Send an...
6	Bill Re...	56	Don't k...	???

Here's how we use the FLG
platform to manage new leads
& onboard customers in 5
simple steps 🙌

1. New lead received

- ✓ Instantly allocated to a user
- ✓ A welcome email is sent
- ✓ The user is tasked to call the lead

The screenshot displays a CRM interface for a new lead. At the top, there are tabs for 'Summary' and 'Details', with 'Details' selected. A '1 Linked Lead' indicator is visible in the top right. Below the tabs, a progress bar shows the lead's status: 'Open 0 Hours', 'New Received' (highlighted in blue), 'Valid', 'Cont', 'Qual', and 'Conv'. The main content area is divided into two columns of information:

Contact & Reference Mr. Example Lead (Made Up Co.) (144719915)	Lead Group & Type Leads › Lead
Date & Time Received 2nd Aug 2019 10:56	Status & Assigned User Received (Daniel Beckett)
Phone Number Call Text 01282798545	Alternative Phone Number None
Email Address OK contact@flgtechnology.co.uk	Notes None
Edition None	Account ID None
Billing Email Address None	Flow XO Account Added None

Below the information table, there is a row of buttons: 'Edit', 'New', 'Forms', 'Journeys', 'Workflows', 'Status', 'User', 'Introducer', and 'Referral'. A 'More' button is also present. The 'Chase Contact Workflow' section shows '0 of 6 Done' details and a 'Stop Workflow' link. The task list includes:

- Task Overdue**: New lead: Make first call. Created by System, Assigned to Daniel Beckett, Due today at 10:56. Includes checkmark and edit icons.
- Email Delivered**: Hello from Daniel Beckett at FLG. Sent by System, Today 10:56. Includes calendar icon.

At the bottom, there is a 'Filters' button and a pagination control showing '1 to 2 of 2' with navigation arrows for 'First', 'Prev', 'Next', and 'Last'.

2. Chase contact



The 'Chase Contact' workflow begins & the user is prompted to call the lead

Nothing ever missed, no opportunity left behind.

The screenshot displays a window with a list of six tasks, each with a play button icon, a condition, a title, and a due date. The tasks are:

- Task [Assigned User] with 'Chase contact: Second attempt'**
Due in 3 Days, Mon, 5th Aug 2019 10:56
- Contact Customer with Email: Onboarding - Chase Contact**
Due in 4 Days, Tue, 6th Aug 2019 10:56
- Task [Assigned User] with 'Chase contact: Third attempt'**
Due in 6 Days, Thu, 8th Aug 2019 10:56
- Task [Assigned User] with 'Chase contact: Fourth attempt'**
Due in 10 Days, Mon, 12th Aug 2019 10:56
- Task [Assigned User] with 'Chase contact: Fifth attempt'**
Due in 17 Days, Mon, 19th Aug 2019 10:56
- Task [Assigned User] with 'Chase contact: Final attempt'**
Due in 32 Days, Tue, 3rd Sep 2019 10:56

Each task entry includes a 'Defer' and 'Cancel Action' link on the right. A 'close' button with an 'x' icon is located at the bottom right of the window.

During a fact find call, the user collects the data they need & it's automatically saved against the lead.

Home → Mr. Example Lead (144719915) → Fact Find

Fact Find

First name *

Last name *

Company

What does the Company do?

What do they need software to do (achieve a goal, solve a problem, satisfy a need)


How do they deal with that problem right now?

What's the timeline for making a decision? / How urgent is the need?

3. Demo

User availability is checked, they book a demo & their calendar is updated.

Home → Mr. Example Lead (144719915)
New appointment

 Appointments is an early release feature. That means we're still working on it, and it may change often. Your feedback is really important, please [tell us what you want](#) from it!

User

Lead assigned user (Daniel Beckett) ▼

Users with a connected calendar are shown here.

← August 2019 →

Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

12:30

12:45

13:00

13:15

13:30

13:45

14:00

The 'Demo Arranged' workflow sends an email reminder to the lead & creates a task for the user.

The screenshot displays a CRM interface for a lead. At the top, there are tabs for 'Summary' and 'Details', and a '1 Linked Lead' indicator. Below this is a workflow progress bar with steps: 'Open 0 Hours', 'New', 'Valid', 'Cont', 'Qual Demo Arranged' (highlighted in blue), and 'Conv'. The main content area is divided into two columns of information:

Contact & Reference Mr. Example Lead (Made Up Co.) (144719915)	Lead Group & Type Leads > Lead
Date & Time Received 2nd Aug 2019 10:56	Status & Assigned User Demo Arranged (Daniel Beckett)
Phone Number Call Text 01282798545	Alternative Phone Number None
Email Address OK contact@fgtechnology.co.uk	Notes None
Edition None	Account ID None
Billing Email Address None	Flow XO Account Added None

Below the information table is a navigation bar with buttons for 'Edit', 'New', 'Forms', 'Journeys', 'Workflows', 'Status', 'User', 'Introducer', and 'Referral', along with a 'More' dropdown.

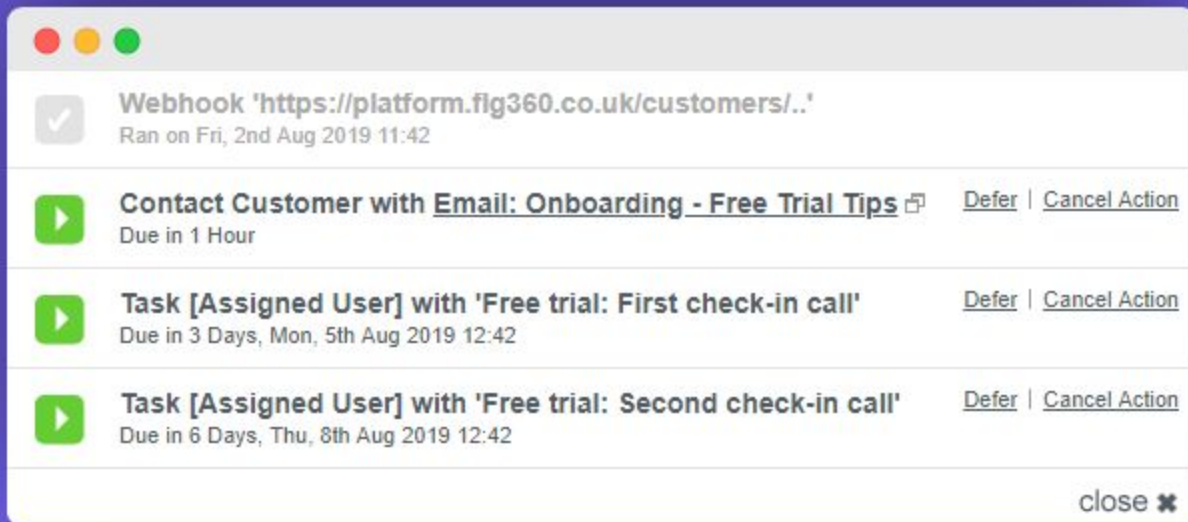
The lower section shows a list of three items:

- Appointment** (FLG Demo): Due in 3 Hours. Created & assigned to Daniel Beckett. Due today at 14:00.
- Task** (Due Soon): Demo arranged: Find the event in Google Calendar, set conferencing to BlueJeans, and invite the customer. Created by System, Assigned to Daniel Beckett, Due today at 11:07.
- Email** (Opened Today 10:56): Hello from Daniel Beckett at FLG. Sent by System.

At the bottom, there is a 'Filters' button and a pagination control showing '1 to 3 of 3' with navigation arrows for 'First', 'Prev', 'Next', and 'Last'.

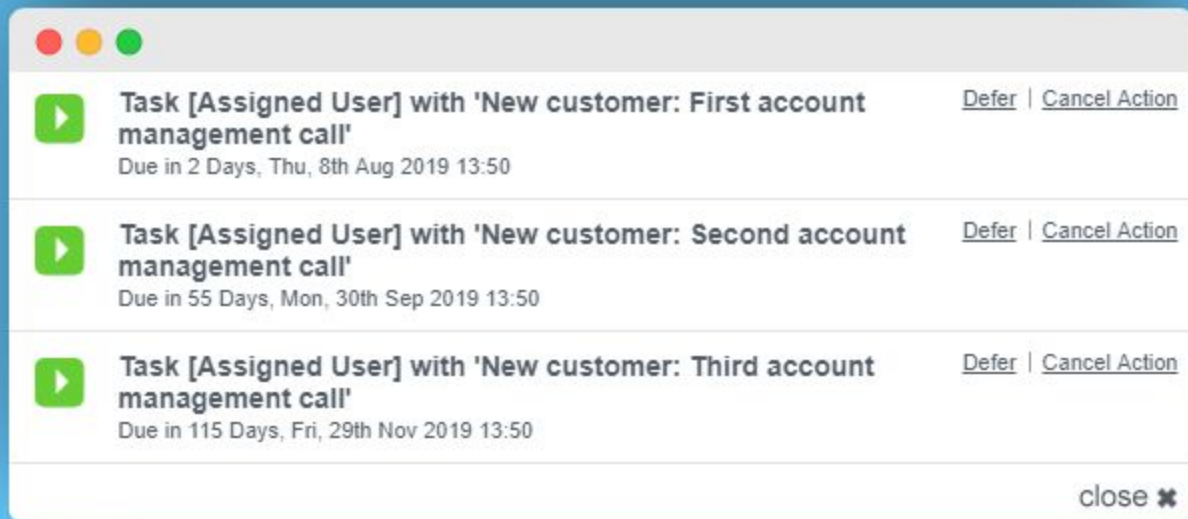
4. Free trial

The 'Free Trial' workflow sends useful set up emails to the lead & the user is tasked with follow-up calls



5. Subscription

The 'New Customer' workflow sends an onboarding email & the user is tasked with some account management calls



How could automation transform YOUR lead management process?

The power of FLG's automated workflows means you can set up the platform however you need it to work - no need to change your sales process!

- ✓ Improve efficiency
- ✓ Eliminate human error
- ✓ Make room for growth!

Contact me on

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or book a demo at

getflg.com/sign-up