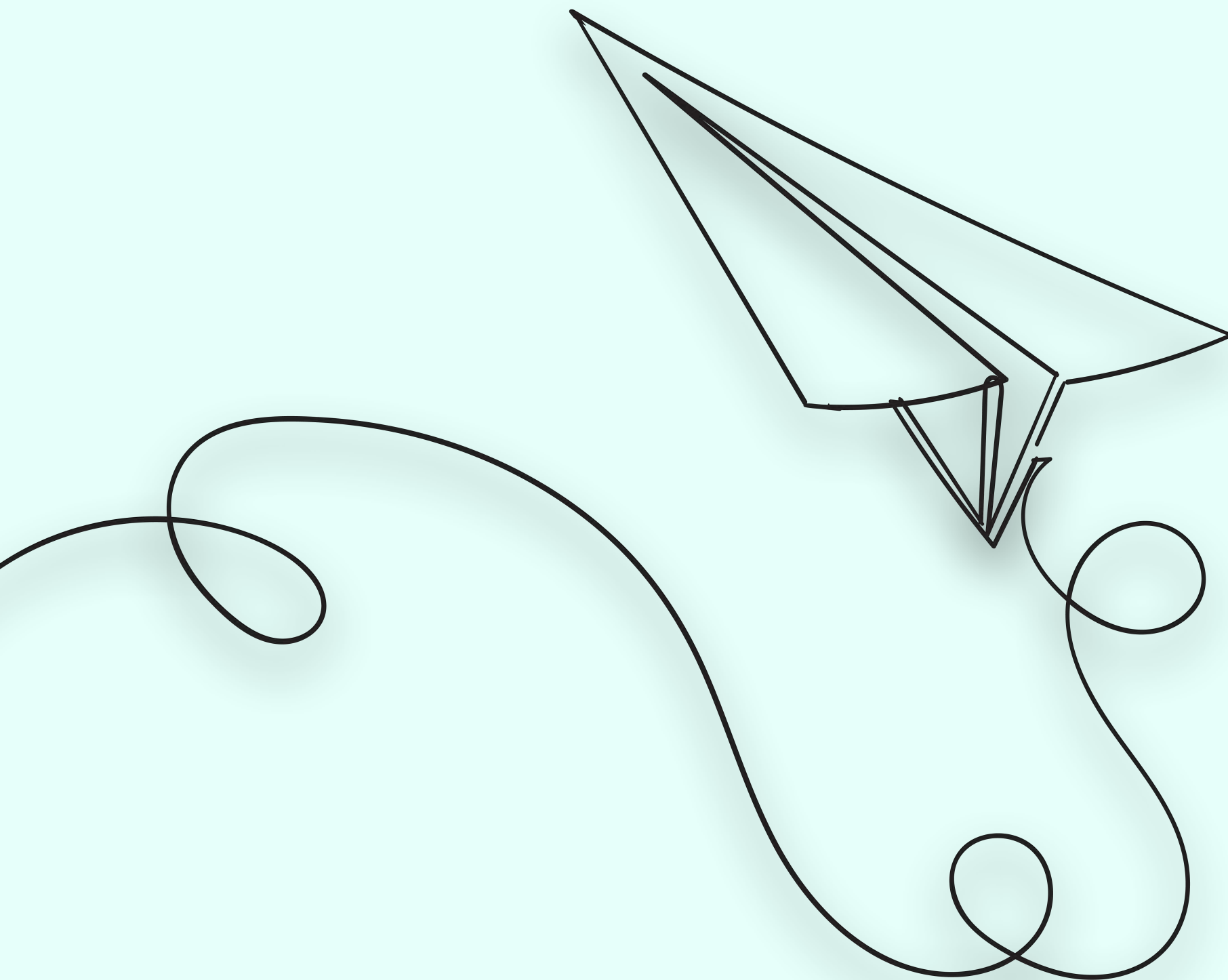




How to Improve your  
Lead Management with  
Cloud-Based Software

01. 02. 03.



**INDUSTRY: Finance and Insurance**

**SALES: National**

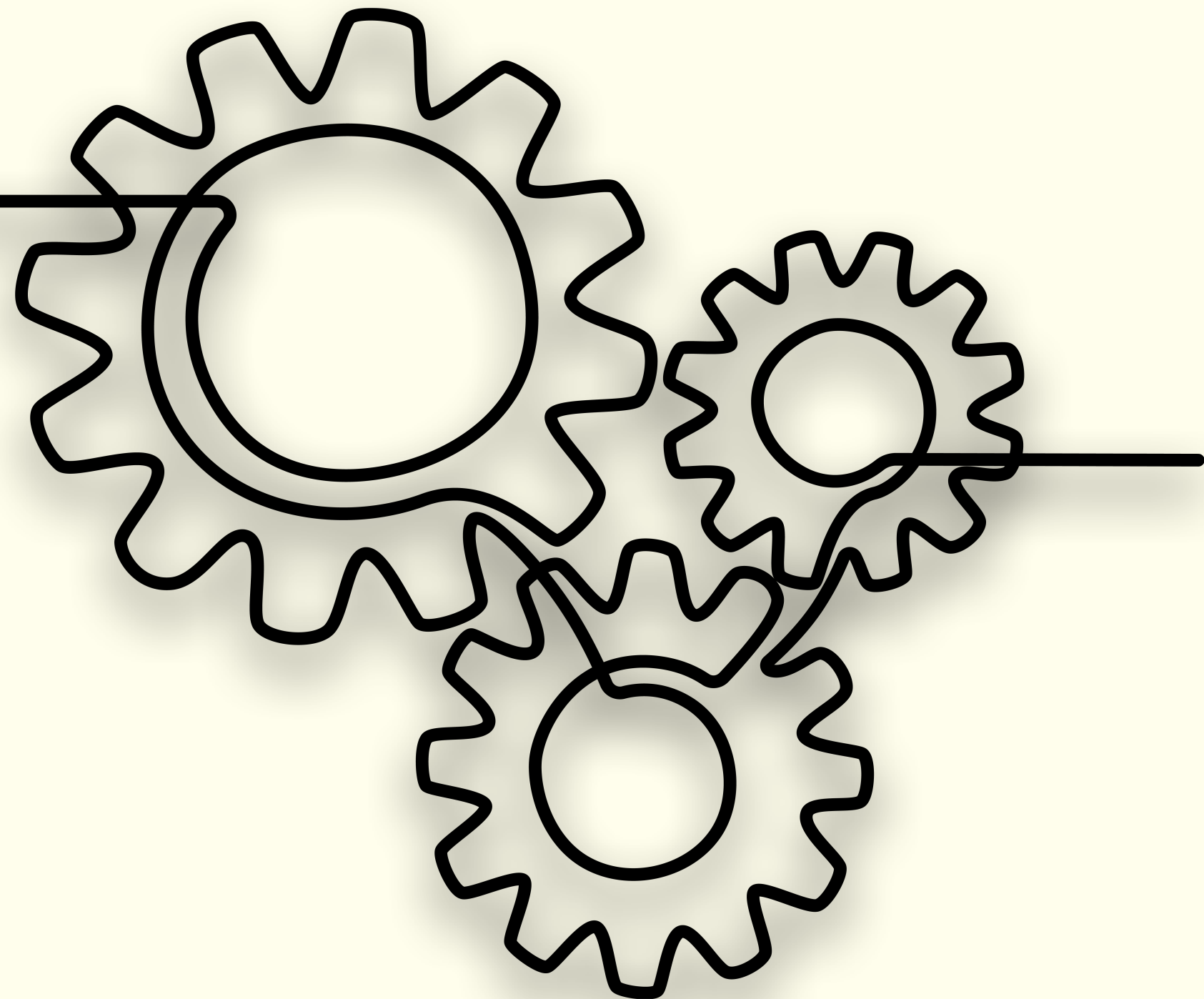
**CUSTOMERS: B2C and B2B**

**Win in Today's Battle for  
Account Manager Sales.**



## How to Improve your Lead Management with Cloud-Based Software

01. 02. 03.



**More than ever...**

**A digital world demands speed-to-lead.**

For the best chance of closing sales and reaching company targets, it is critical to get the right account manager in contact with your prospect in the least amount of time possible.

If a lead is contacted within 5 minutes, you have an 80% chance of doing business with them. If response time takes 10 minutes, the likelihood drops to 5%.

**Some questions to consider before you start:**

- 1 How long does it take for an account manager to respond to a prospect today? And what's the cost?
- 2 Where are most of my leads coming from? And are they qualified?
- 3 Do I have budget to incorporate digital solutions to address team gaps and grow the business?



# How to Improve your Lead Management with Cloud-Based Software

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## Are your account managers enabled to respond quickly?

It is not uncommon for large companies to use CRMs to manage their customer processes. However, encouraging your sales teams to use your complicated CRM may not always do the trick.

Since a delayed response will not suffice for today's consumers, it's important to understand how quickly your account managers typically respond to inbound business opportunities before trying to improve it.

Survey existing customers, generate test queries, or reconnect with lost prospects are great examples of ways to learn more.

## What do your prospects expect during the buying process?

Considering the breakneck pace at which technology is progressing in the ways of doing business, it's no surprise that sales teams may feel pressured with deciding what to incorporate into their marketing and sales strategies.

A strong revenue generating strategy and administration team are essential to engaging your account managers and seeing results. Understanding where your leads come from lets you determine where you can further put focus to generate high quality prospects. Improve your inbound lead management by starting to track where your leads come from.

## Should I invest in sales enablement to help my team?

Technology is quickly emerging and shaping the future of doing business. The recent pandemic has fuelled mass adoption of many new technologies by the most effective companies in their space. Digital platforms provides sales professionals with a competitive edge, while also improving and personalizing the buyer experience. Given the accelerated pace of technological change, the question is not whether you can afford to invest, but rather, how can you afford not to invest.

*"I researched the available lead distribution software and Lead Assign stood out above the rest. We've been using it for over a year now and it's simplified the lead distribution process tremendously, and brought our lead response time down to under 10 minutes. I can wholeheartedly recommend it to anyone with high lead volume and desire to improve lead response times."*

- Jonathon D., Business Operations Manager, The Vacationeer





## How to Improve your Lead Management with Cloud-Based Software

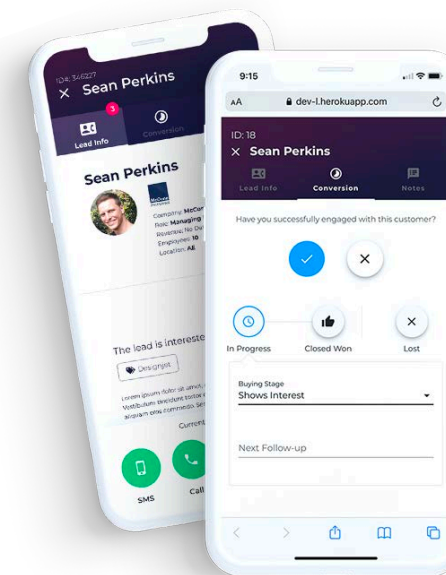
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## How Lead Assign helps finance and insurance companies

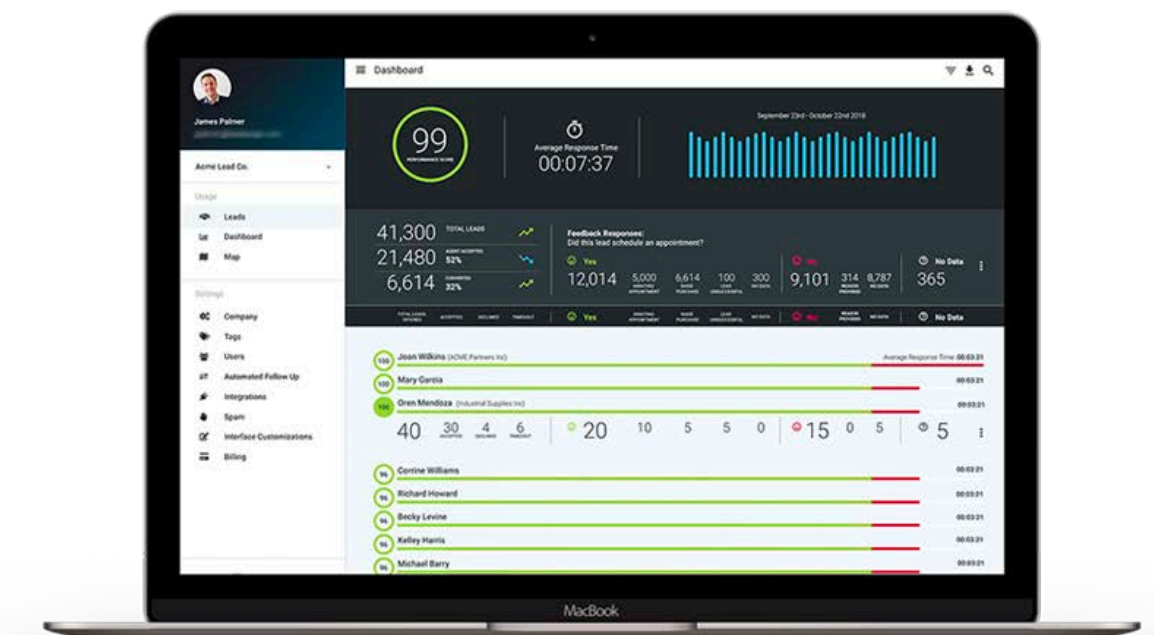
### Improve Speed-to-Lead

In highly competitive markets, engaging with customers quickly is essential to conversion. Use real-time lead analysis to automatically route prospects to the right account managers every time. The no-fuss user interface allows account managers to accept and contact leads with the click of a button.



### End-to-End Channel Visibility

With its direct integration capabilities, all leads are tracked in a digital platform, so you can be confident of where and how the marketing spend is performing. A detailed dashboard is your team's operation control centre for sales performance.



## Flexible Packages to Meet Demands of Finance and Insurance Companies of All Sizes

We've worked with national and international companies that are game changers in their market. Be confident that our lead management experts can build and customize the right solution to meet your needs in the ever-evolving finance and insurance industries.

[Get Started Today](#)