

# Sales & Marketing with accessplanit





the virtual summit  
to training industry success



session

17:00 BST • TODAY

Matt Smalley,  
accessplanit

Sarah Bickerstaffe,  
accessplanit

An accessplanit session on

# Sales & Marketing

A deep dive into the world of sales & marketing  
through your accessplanit system.

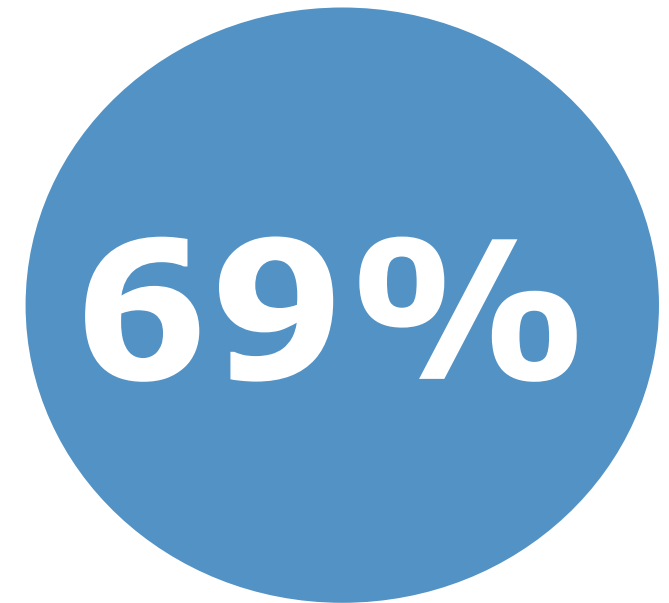
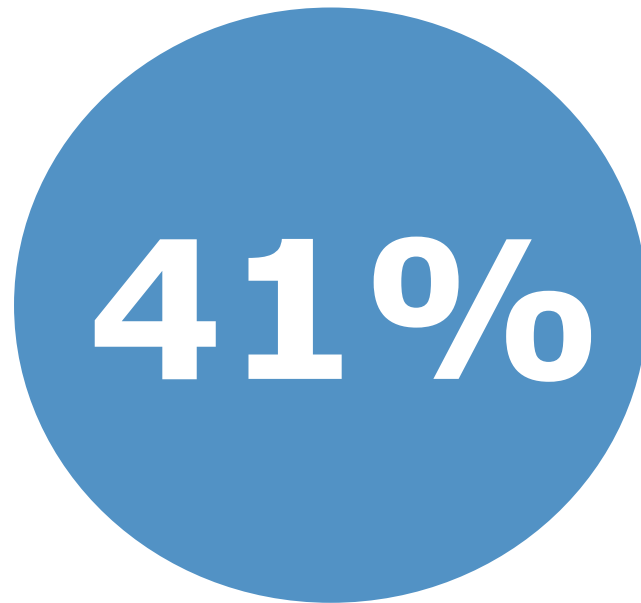
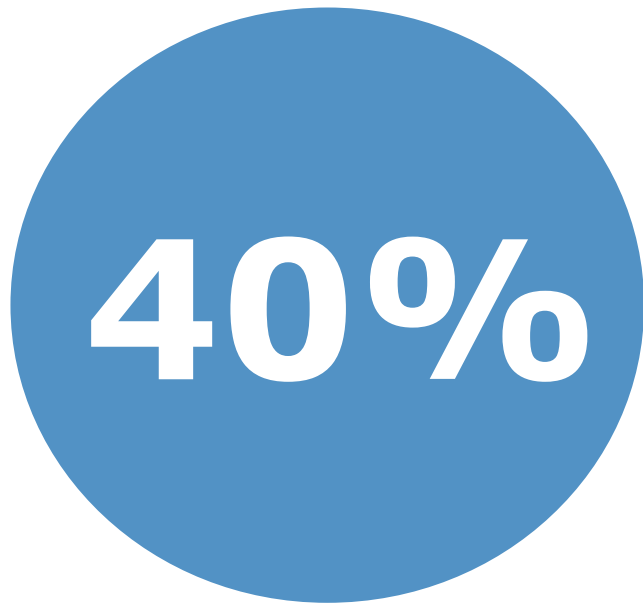


# Agenda

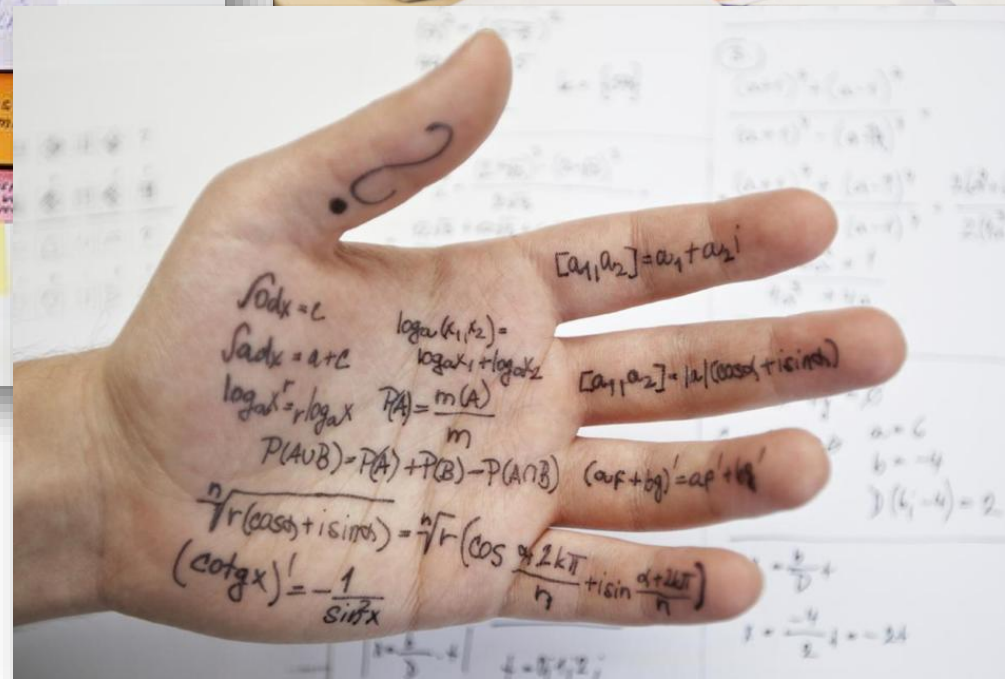
- Incoming enquiries
- Automation, automation, automation!
- Proactive marketing
- Best practice



# Incoming Enquiries



# Incoming Enquiries





# Incoming Enquiries

Website:



[SOFTWARE +](#) [PACKAGES](#) [ABOUT +](#) [RESOURCES](#) [BLOG](#) [CONTACT](#)

[BOOK DEMO](#)

Are you looking to book a course exclusively for your company or do you want to discuss something more bespoke?

## Make an Enquiry

Select Course \*

First Name \*

Surname \*

Company Name

Email address \*

Mobile

Phone

Tell us more about your enquiry

[SUBMIT](#)



# Incoming Enquiries



My Opportunities

[+ Add](#)

Closed Won	Enquiry	Quotation	Closed Lost	Call Scheduled	Call Held
<p><b>Online Enquiry</b></p> <p>Ms</p> <p>Updated: 04/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Phone Enquiry - Applega...</b></p> <p>Applegate Global</p> <p>Updated: 04/05/2020</p> <p>Closing: 27/11/2019</p>	<p><b>New Telephone Enquiry -...</b></p> <p>Cegos</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>
<p><b>Telephone Enquiry - H&amp;S...</b></p> <p>Applegate Global</p> <p>Updated: 04/05/2020</p> <p>Closing: 30/09/2019</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>New Enquiry</b></p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 04/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>
<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: 31/05/2019</p>			<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 07/05/2020</p> <p>Closing: -</p>		



# Incoming Enquiries



Email:

**Opportunity Maintenance**  
Managing Safely for 6 delegates

- Details
- Items (1)
- Notes (0)
- File Store
- Communications (0)
- Tasks (1)
- Meetings
- History
- Workflow Errors
- Workflow Instances
- Audit Logs

### Opportunity Details

Actions Save

**Identity**

\* Title: Managing Safely for 6 delegates

Overview:

Description:

**Contact Details**

Contact Details:

Linked To Account: Joe Bloggs Ltd (Select)

Linked To Users: Joe Bloggs (Select)

**Assigned To**

\* Owner Account: accessplanit training (Select)

Assigned To Users: Dan Holden (Select)

Initiated By Users: Dan Holden (Select)





# Incoming Enquiries

Phone:

Opportunity Details

Identity

Title \*

Overview

Description

Contact Details

Contact Details

Linked To Account

Linked To Users

Save & Close

Opportunity Details

Assigned To

Owner Account \*

Assigned To Users

Initiated By Users

Status

Sales Stage

Closing Date

Probability (%)

Source Information

Source

Type

Competitors

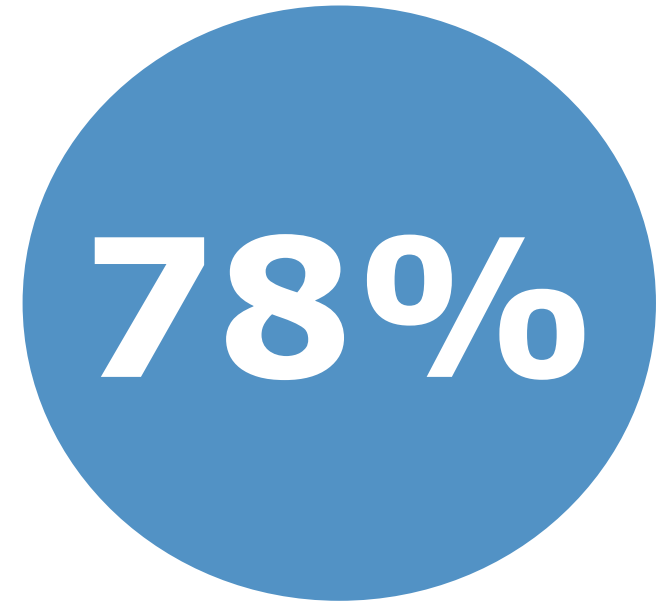
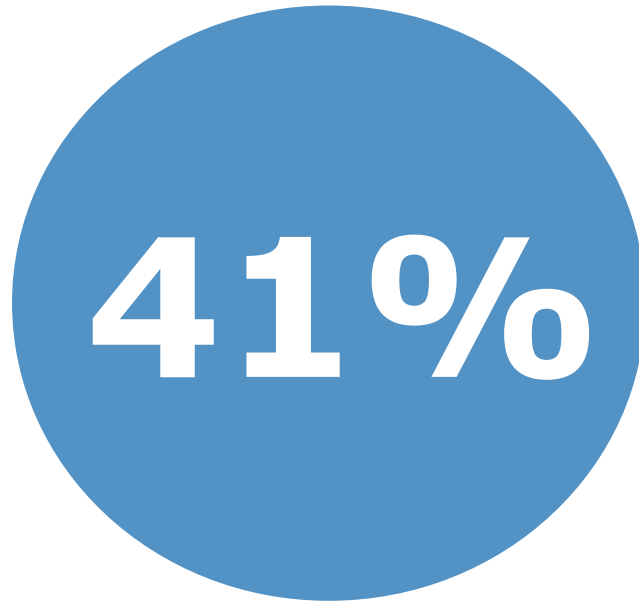
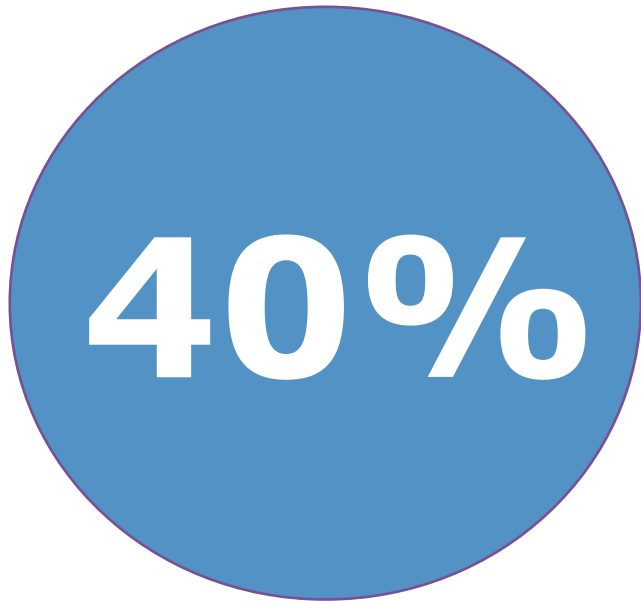
Financial

Value

Save & Close



# Automation



# Automation



# Automation

## Enquiry:

### Make an Enquiry

Select Course \*

First Name \*

Surname \*

Company Name

Email address \*

Mobile

Phone

Tell us more about your enquiry

SUBMIT



# Automation



## Enquiry:

Hi Team,

A new website enquiry has been submitted:

Account: Applegate Global

User: Sarah Jones

Courses: Health and Safety Essentials

Please contact the client within the next 2 hours.



# Incoming Enquiries



My Opportunities

+ Add

Closed Won	Enquiry	Quotation	Closed Lost	Call Scheduled	Call Held
<p><b>Online Enquiry</b></p> <p>Ms</p> <p>Updated: 04/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Phone Enquiry - Applega...</b></p> <p>Applegate Global</p> <p>Updated: 04/05/2020</p> <p>Closing: 27/11/2019</p>	<p><b>New Telephone Enquiry - ...</b></p> <p>Cegos</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>	<p><b>Online Enquiry</b></p> <p>Applegate Global</p> <p>Updated: 20/05/2020</p> <p>Closing: -</p>
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# Automation

## Quotation:

Quotation Ref: 398  
Attention: Sarah Jones  
Company: Applegate Global  
Sales Rep: Joe Nixon  
Email: [joesalertsaddress@gmail.com](mailto:joesalertsaddress@gmail.com)

Dear Sara 5) Payment Terms

Thank you • Payment must be made prior to course commencement. Please make cheque payable to accessplanit training Limited or direct bank tran  
We trust the above price meets your requirements and we look forward to hear from you soon. Please do not hesitate to co  
1) Pricing information.

Health a  
10 place

[Accept Quotation & Book Now](#)

£1500

£0

2) Value-Added Services:

- Highly qualified and experienced Instructor with certification
- All Courses are CPD accredited
- Printed course materials with DVD
- Free access to our training portal
- Certificate of Course Completion
- Complimentary lunch with morning and afternoon refreshment shall be provided
- Free parking

3) Terms & Conditions

- The above course is only valid subject to a minimum guarantee of 15 participants





# Automation



Book Now:

**Shopping basket** | Basket | Login | Delegates | Payment | Confirmation

Your basket

Basket

Use this section to edit or remove courses from your basket.

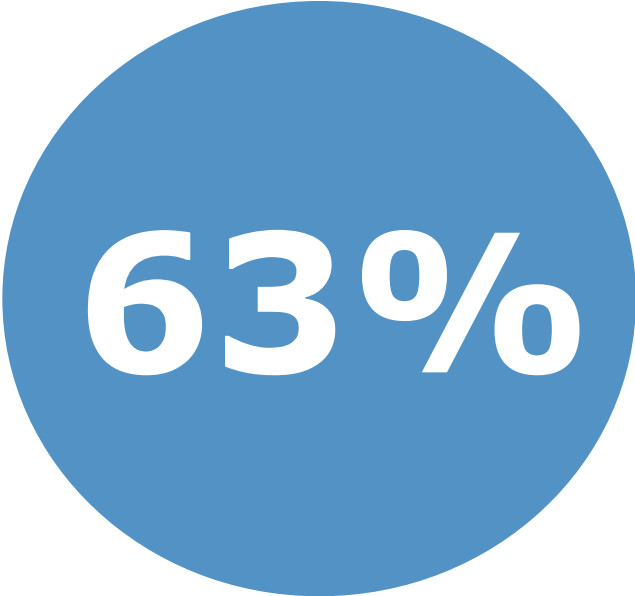
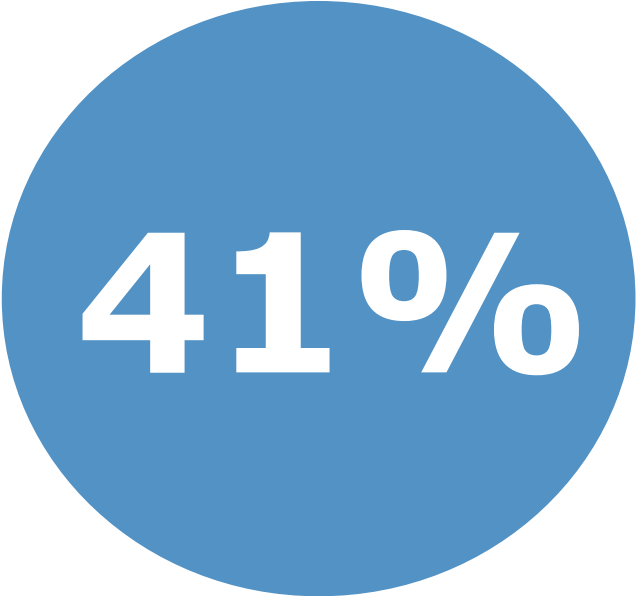
Title	Location	Date	Delegates	Cost	
Abrasive Wheels in the Workplace <a href="#">Course Details</a>		17/07/2019 11:00 - 16:00	1	GBP 1000.00	<a href="#">Remove Course</a> ✕
<b>Total</b>				GBP 1000.00	

[Clear Basket](#) ✕ [Continue Shopping](#) [Next Step](#) ➔

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# Email Marketing





# Email Marketing

Marketing Emails



click here to view our  
**fire safety courses**



# Email Marketing



## Targeted Marketing

### Delegate Maintenance

+ Add Filters Bulk Edit Export Search

Booked x Cancelled x Completed x Failed x H&S Essentials No attend x  
Not Invoiced x Past x Payment Incomplete x Sarah Jones Cleanse x The Month x This Week x  
Today x Waiting List x More Filters

<input type="checkbox"/>	User Fullname	Account Name	Course Template or Alias Name	Start Date	End Date	Status	Points	Invoice Reference	Date Registered	<input type="checkbox"/>
<input type="checkbox"/>	Joel	accessplanit training	Health and Safety Essentials	01/02/2019 09:00	01/02/2019 17:00	Waiting List		INV001561	24/01/2019 11:56	<input type="checkbox"/>
<input type="checkbox"/>	Anish	accessplanit training	Applegate In House H&S Essen	22/04/2019 09:00	22/04/2019 17:00	Booked		INV001691	16/04/2019 10:43	<input type="checkbox"/>
<input type="checkbox"/>	Joel	accessplanit training	Applegate In House H&S Essen	22/04/2019 09:00	22/04/2019 17:00	Booked		INV001698	16/04/2019 10:43	<input type="checkbox"/>
<input type="checkbox"/>	Lawrence Adamoli	Robel, Ward and Parisian	Applegate In House H&S Essen	22/04/2019 09:00	22/04/2019 17:00	Booked		INV001699	16/04/2019 10:43	<input type="checkbox"/>
<input type="checkbox"/>	Lawrence Adamoli	Robel, Ward and Parisian	Health and Safety Essentials	14/03/2019 09:00	14/03/2019 17:00	Booked		INV001646	06/03/2019 08:27	<input type="checkbox"/>
<input type="checkbox"/>	Lawrence Adamoli	Robel, Ward and Parisian	Health and Safety Essentials	01/02/2019 09:00	01/02/2019 17:00	Cancelled	1.00	INV001562	24/01/2019 11:56	<input type="checkbox"/>
<input type="checkbox"/>	Lawrence Adamoli	Robel, Ward and Parisian	Health and Safety Essentials	17/04/2018 09:00	17/04/2018 17:00	Completed	1.00	INV000943	20/04/2018 08:36	<input type="checkbox"/>



# Email Marketing

## Performance Tracking

**eCampaign Maintenance**

Details

- Performance**
- Recipients
- Bounced **0**
- Clicks **0**
- Deferred **0**
- Delivered **2**
- Dropped **0**
- Opened **7**
- Spam Reported **0**
- Unsubscribed **0**

**Performance**

**Sent**

Sent Count	0
Processed Count	2
Delivered Count	2
Opened Count	7

**Links**

Link Count	2
Link Clicked Count	0

**Spam and Unsubscribe**

Spam Report Count	0
Unsubscribed Count	0

**Message Failures**

Bounced Count	0
Dropped Count	0
Deferred Count	0



# Email Marketing

## Performance Tracking



eCampaign Maintenance

- Details
- Performance
- Recipients
- Bounced 0
- Clicks 7**
- Deferred 0
- Delivered 2
- Dropped 0
- Opened 7
- Spam Reported 0
- Unsubscribed 0

### Events

Filters Export Search

You do not yet have any filters defined for this DataGrid, to create a filter please click the More Filters button

<input type="checkbox"/>	Recipient Full Name	Recipient Email	Date
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	09/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	09/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	09/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	13/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	14/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	21/05
<input type="checkbox"/>	Sarah Jones	sarahjonesaccessplanit@gmail.com	23/05

1 - 7 of 7 items 10 Per Page



# Email Marketing

Follow Up

Email Details

Creation Type \*

Template

Sender and Recipient

To Address Property \*

Recipient Email

Email Template

Email Template \*

Select

Send

1 - 7 of 7 items 10 Per Page





# Best Practice

## Reporting:

The dashboard displays several key performance indicators (KPIs) and data tables:

- Invoiced YTD:** 88578
- Expected Revenue This QTR:** 16450
- Opportunities Closing this QTR:** 9
- Enquiries Today:** 2
- New Clients This QTR:** 15
- Joe's Appointments YTD:** 2
- Andrew's Appointments YTD:** 0
- Open Tasks This Week:** 19

**Opportunities by Sales Stage MTD**

Call Held	3
Call Scheduled	8
Closed Won	6
Closed: Lost	4
Facilitator Change	1
Meeting Held	1
Meeting Scheduled	1
Quotation	3

Records: 27. [Open DataGrid](#)

**eCampaign Success**

Delivered Count (Sum)	Opened Count (Sum)	Bounced Count (Sum)	Link Count (Sum)	Deferred Count (Sum)	Processed Count (Sum)
31	77	0	52	0	31

Records: 26. [Open DataGrid](#)

**Unassigned Opportunities**

Date Created	Title	Sales Stage Name	Expected Revenue	Closing Date	Assigned To User Names	Linked To Account Name
30/05/2019 12:02	Online Enquiry	Meeting Scheduled	0			Applegate Global
22/05/2019 15:13	New Telephone Enquiry - Cegos	Closed: Lost	0			Cegos

Records 1 to 14 of 14. [Open Full DataGrid](#)

**My Open Opportunities**

Assigned To User Names	Closing Date	Date Created	Expected Revenue	Linked To Account Name	Linked To User Names	Probab
Joe Nixon		13/02/2019 14:27	0	Shaw2Succeed	Mark Fryer	0
Joe Nixon		07/05/2019 13:45	0	Applegate Global	Sarah Jones	0
Joe Nixon	15/05/2019	15/05/2019	0	Applegate Global	Sarah Jones, Sam	0

Records 1 to 6 of 6. [Open Full DataGrid](#)

**Upcoming Appointments**

Subject	Start Date	End Date	Organiser Full Name	Account Manager Name	User Attender Name
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# Q&A





**Up next:**

*Session Title*

Session bio.

