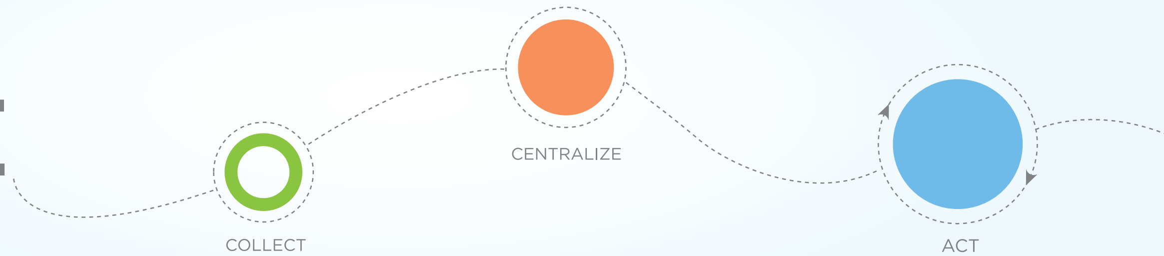
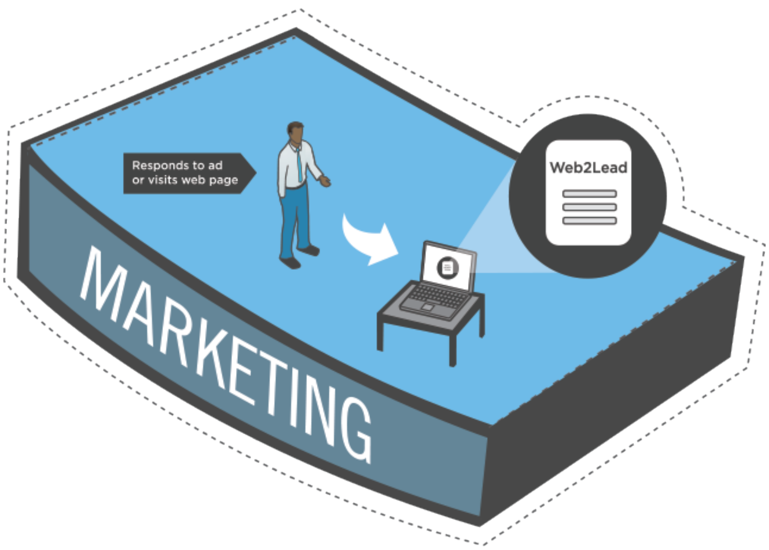
USE CASE



Web2Lead is one of the simplest applications to build in Clicktools, but also one of the most flexible and useful. This document outlines some approaches when using Web2Lead forms in Clicktools.



The basic activity flow goes like this:

- Prospect clicks on ad/banner, visits your website, etc.
- Clicktools form is presented.
- Clicktools creates lead in CRM *(and potentially much more).*
- Lead is scored and passed to Sales for action or to Marketing to nurture.

Let's look at this process in a little more detail.

Prospect clicks on ad/banner

Sign-up forms are everywhere.

There's practically no limit to how companies can use web forms. It can be as simple as a newsletter sign-up or a Contact Me form or any other way for people to register interest in your company, product, or service.

Beyond that, forms can be used in various places, such as on landing pages from your Google Ads or on your Facebook page to feed new leads into your CRM system.

So, what do we do once the information is collected? We create a Lead.

That's it? Well, actually no. Sure, you can just create a Lead, but let's look at some common complications that may occur with a standard Web2Lead form and see how Clicktools can help.

What happens if...?

You already have a Lead or a contact in your CRM?

Use Clicktools to check to see whether a Lead and/or Contact already exists. If neither exists, then create a Lead. If either or both exist, then create nothing and put a note against either one. You may also want to put a note saying that you have a dupe!

You use Personal Accounts or don't use Leads at all?

Then use Clicktools to create a Personal Account or a linked Contact and Account.

You use the same lead form or landing page in lots of places. How do you differentiate?

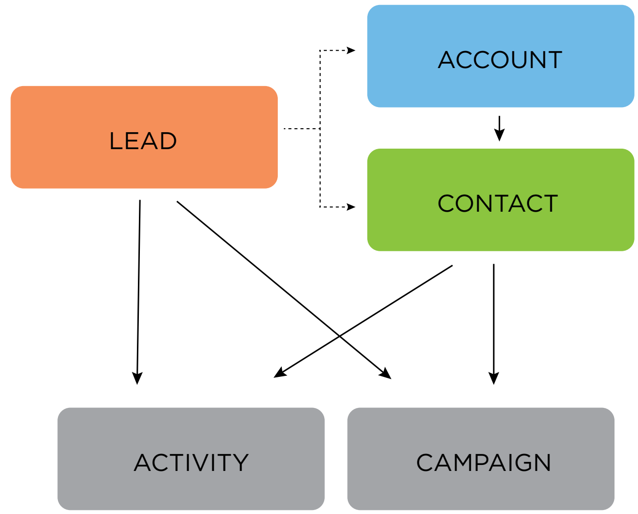
Use Clicktools to track the source of the landing page (e.g. record whether it comes from a Google ad, link, banner, Facebook tab, partner link, etc.) and use this information to drive different information in your CRM. You could record different lead sources, add to different campaigns, or create different follow-up activities.

You want to let people request a call back or an email?

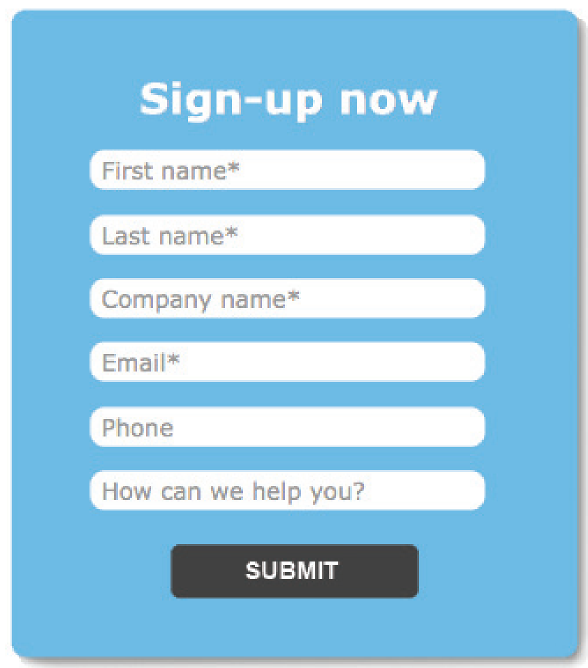
Put the option on the form and drive different types of activities from Clicktools. Simple.

My CRM has built-in Web2Lead capability. Why should I use Clicktools?

- Faster deployment
- No reliance on IT for those pesky landing pages
- More styling options
- More content options *(e.g. question types, logic, conditions)*
- Easier integration into CRM



Let's look at one of the more complex (but still common) examples.



We start with a completed web form.
A lady called Daisy Alice has heard about our WidgitBuster product and just signed up to receive further information.

Let's assume our company doesn't use Leads, but goes straight to Accounts and Contacts (perhaps because it's more consumer-based).

So, what to do with this information?

Everything we have done can be seen in the next screenshot.

clicktools

Web2Lead

We have:

* Created an Account
* Created a Contact
* Linked the Contact to the Account
* Created an Activity noting the form has been completed
* Added Daisy to a TeleSales campaign for call back.

Daisy Alice

Customize Page | Edit Layout | Printable View | Help for this Page

Contact Detail

Edit | Delete | Inbound sales enquiry | Tele-sales campaign | Support call | Test VF button script

Name	Daisy Alice	Account Name	DA Incorporated
Email	clicktoolsefm@gmail.com	Phone	0800 0432587
twitter user id			

Activity History

Log A Call | Mail Merge | Send an Email | Request Update | View All

Activity History Help

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Contact us form completed		✓	3/29/2013	Click Tools	3/29/2013 5:58 AM

Campaign History

Add to Campaign

Campaign History Help

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit | Del | View	TeleSales		Telemarketing	Added	☐	3/29/2013 5:58 AM

This is just one example. You can see that Clicktools can be much more than Web2Lead. In fact, we like to call it Web2Anything. No code. No IT. Clicktools is the simplest, most effective and powerful way to automatically feed prospects into your CRM system.

Now, It's Your Turn.

We hope this gives you good insight into how you'd benefit from implementing a Web2Lead process using Clicktools and CRM. We hope you get started as soon as possible. When in doubt, remember this core principle; when you strategically collect, centralize, and act on customer interactions, you will dramatically improve customer relationships. It's just a matter of integrating Clicktools with your existing CRM solution, which once you get a hang of it, is one of the most powerful ways to positively affect your business. And the best part – we are here to help every step of the way!

ABOUT CLICKTOOLS LTD.

Clicktools provides SaaS solutions that leverage CRM to collect, centralize, and act on customer interactions. Since 2001, Clicktools has helped organizations of all sizes and across industries improve customer experience. Thousands of marketing, sales, and support professionals worldwide use Clicktools to collect information through surveys, scripts, and forms; centralize the data in CRM; and act on insights to deepen customer relationships. Notably, Clicktools was the first survey provider to integrate with Salesforce® and was an original member of the AppExchange®. The company is privately held with headquarters on the South Coast of England and a US-based office in Phoenix, Arizona.

Contact Us Today For a FREE Demo

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