

# MAJOR PROJECT REPORT

## LEADSQUARED



### SALES EXECUTION AND MARKETING AUTOMATION PLATFORM

**Submitted in partial fulfillment of the Degree Bachelor of  
Technology in Biotechnology, VIII Semester**

Guidance by

Leela Gangadhar  
Manager- Sales Development  
LeadSquared - MarketXpander

Dr. Jata Shakar  
Department of biotechnology  
Jaypee Institute of Information Technology

**DEPARTMENT OF BIOTECHNOLOGY  
JAYPEE UNIVERSITY OF INFORMATION TECHNOLOGY, Solan**

<u>Serial Number</u>	<u>Contents</u>	<u>Page number</u>
1.	Certificate	6
2.	Acknowledgement	7
3.	Summary	8
4.	Significance and Possible results	10
5.	Relevance of work	11
6.	Objectives	12-13
7.	Targets	14
8.	Literature review and theoretical discussions	15
9.	LeadSquared in Various applications	15
10.	LeadSquared in Education Industry	16
11.	LeadSquared in Healthcare Industry	17
10.	LeadSquared in Travel Industry	18
11.	LeadSquared in Finance Industry	19
12.	LeadSquared in Real Estate Industry	20
13.	LeadSquared in Entertainment Industry	20
14.	Generalized analysis and summarized outcome of literature review	21

15.	Primary and secondary objectives	22
16.	Methodology - Introduction	23
17.	Proposed solution	24
18.	Design and modelling	25-26
19.	Module Specifications	27
20.	Lead Nurturing Automation	28
21.	Tools Used- Sales Navigator and Lusha	29
22.	Sales Acceleration	30
23.	Summary	31
24.	Results and Analysis	32-33
25.	Summary of Internship	34
26.	Conclusion	35
27.	References	36

## CERTIFICATE

This is to certify that the work titled “**Sales execution and Marketing automation platform**” submitted by “**Aakanksha Pandey**” in partial fulfillment for the requirements of the award of degree of Bachelor of Technology in biotechnology of Jaypee University of Information Technology, Solan has been carried out under my supervision. This work has not been submitted partially or wholly to any other university or institute for the award of this or any other degree or diploma.

Signature of supervisor -

The image shows a handwritten signature in black ink that reads "leela.g". The signature is written in a cursive, lowercase style.

Name of supervisor - Leela Gangadhar

Designation - Manager (Sales Development)

## ACKNOWLEDGEMENT

I take this opportunity to express our sincere gratitude to our supervisors Ms. Leela Gangadhar and Dr. Jata Shankar for their insightful advice, motivating suggestions, invaluable guidance help and support in successful completion of this project and also for her constant encouragement and advice throughout our project. We would also like to convey our thanks to the teaching and non-teaching staff of the Department of Biotechnology, for their invaluable help and teachings. I would also be grateful to my teammates and classmates for their help, encouragement, and invaluable suggestions. Lastly, we would like to thank our family members for their love and support throughout the period of this project.

A handwritten signature in black ink, appearing to read 'Aakanksha Pandey', with a stylized, cursive script.

Signature: Aakanksha Pandey

## SUMMARY

LeadSquared is a sales and marketing automation platform. It is one of the biggest SaaS Platforms (Software as a Service) registered under the name, MarketXpander. The company specializes in increasing sales velocity and empowering marketing techniques through automations and provides Lead Management platform. LeadSquared is one of the biggest names in the Indian market when it comes to CRMs and Marketing Automation tools.

It is a B2B business model where companies, from big enterprises to small start-ups, incorporate LeadSquared into their day-to-day processes to manage their leads and track them to attain more sales and conversions. The basic task was to perform market research for example looking out companies who need a CRM or just received major funding and then finding people to contact in those companies who are decision makers or can further connect you to the decision makers and approaching them via emails, cold calls etc to set up a meeting with them.

The idea of Lead Generation in the CRM Industry is basically known as Sales Business Development which is a revolutionary idea and has created a new medium for revenue generation. The project seeks in optimizing the costs associated in the sales and the marketing activities as well as implementing automation along with expanding the company's revenue base by developing new strategies to maximize the returns in each segment in which the company has invested.

The methodology adopted in the process can be categorized into 4 parts-

1. Prospecting (Market Research)
2. Communicating
3. Relationship Building
4. Selling.

For the efficient working of the process the major tool used was **LeadSquared Software** itself along with **Lusha, Ghostrey, Clearbit, LinkedIn Premium** to find the contacts of the prospects and communicating with them. The most important results that were encountered was solving the business queries of verticals such as hospitals, real estate, finance, electrical industry. The platform through its automation feature **reduced the manual effort** by managing the stored data and made its retrieval also efficient. The team is focused to expand its research on various other segments such as pharmaceuticals, education, placement and travel industry as well as the entertainment industry

# **INTRODUCTION**

## **Introduction to the area of work**

LeadSquared is a SaaS platform serving as a single tool which streamlines the digital, marketing sales functions apart from acting as an effective CRM. It is an exclusive product of the MarketXpander company helping other organizations avoid the hassle of multiple tools. It seamlessly fits into the mould of companies from varied sectors, aiding in their entire sales cycle – right from capture to conversion.

The role assigned to me was that of a Sales Development Representative for Commercial as well as Enterprise region, in the South region of India. The role involved learning about the product in detail and pitching it to the decision makers of companies like DTDC, Ninjacart, CCD and many more through cold calls, cold emails, LinkedIn connections, and relationship building.

The first step was the training of product. We were supposed to learn about the product and understand its implications in various sectors of Education, Lending, Insurance, Real Estate, Banks, Stock Brokerage, Ed-tech, Healthcare, Travel and Hospitality. Then we were supposed to do market research, find companies with high lead volumes, especially B2Cs, and then finding the decision makers of the company like the CEO, COO, CTO, Vice Presidents, Head of Marketing, Head of Sales, and so on. Then it was required to connect with those decision makers through cold calls, cold emails, and LinkedIn messages, and set up a meeting or demonstration of the product after understanding their specific use-case.

## **A brief present-day scenario about the work area**

The idea of sales development is revolutionary and has created a new medium for revenue generation. The role of a Sales Development Representative is one of the most important roles for SaaS (software as a service) based company because more than 70% sales are made through the Sales Development Representatives. The Sales Development Representatives are the first point of contact for the business to the customer. Hence, they must know the ‘art of

selling'. A SDR is supposed to persuade people that his/her company is helping the client's company and it's profitable deal for them.

### **The uniqueness of the methodology that will be adopted**

Being an SD requires an art to figure out the right prospects, engage them and at the end of day, generate qualified meetings for the sales team. Further, BD takes over for the rest of the sales process. The entire process of sales development fits into the diagram:



Fig 1. Triangular model of SD Process

The overall process of sales development starts from the moment of lead generation until qualified meetings are generated. As a part of my project, my major function was to generate qualified leads which I could work upon and also design a suitable automation which could solve the business process of respective clients.

The automation which was to be designed for the clients business had the major objective of making their marketing process streamline.

The main solution which was proposed by me was developing a nurturing theory for dead or non-qualified leads. If, for example 100 leads land on an organization from all the possible



sources (such as website, social media, third party websites, telephony, chat box and others) and only 30 gets converted. An automation can be assigned such that the remaining 70 per cent of the leads will be sent marketing campaigns depending on their activity history. This ensures that all the leads will be in contact and have the probability of being converted to a client one day. This kind of theory works brilliantly for real estate and hospitals where each ticket size is huge and can make a drastic change in revenue.

### **Significance and the possible result**

The methodology to marketing will notify your sales techniques, so interaction and relationship within your team is crucial. After a sales representative schedules a meeting a business development representative takes ahead the discussions further. The meeting or the demonstration is very crucial as it is the decisive point. The Business Development Representative of LeadSquared gets an idea if there is an opportunity of sales or not. Depending on the meeting MRR is assigned, more the number of users, more is the MRR.

### **The relevance of the work**

The main objective of the work was to set up a meeting or demonstration with the correct decision maker of the company who deals with or heads the departments of the company like Sales, Marketing, IT, CRM, Call centre, and Business Development.

Secondary objective was to make sure that the meeting was qualified. It was said to be qualified if the following guidelines were met:

- The company must have a high lead volume.
- The company must have at least 10 sales users or a big database of marketing contacts or at least 10 tele-callers or all of them
- There must be a requirement of a CRM or pain points regarding managing leads, sales, or marketing process which can be solved in LeadSquared.

## **Objectives**

The objectives of the project are to accurately analyze the prospect and their business problems and solve them using LeadSquared platform. We can sub-categories the objectives as:

- To Understand the Lead Management Platform offered by the organization
- To understand how LeadSquared can be compared with its Competitors in the same space.
- To Determine and target right sets of prospects/Companies
- To analyze different methods of contacting the corresponding POC
- To analyze User Behavior and engagement pattern using LeadSquared Dashboard
- To generate Leads of highest quality

## **Methodology involved in achieving Objectives**

1. The first month was the time allocated to understand the LeadSquared system that is offered by the company as a service to all of its clients. The LeadSquared system consisted of 3 main parts :-
  - a. Lead Management Platform
  - b. Marketing Automation Platform
  - c. Field Force Automation Mobile App.
2. The main insight gained during the training period was that LeadSquared unlike its competitors (Zoho, Fresh Sales, Sell.do, Kapture etc) was a CRM solution which had 3 different modules set up on the same system hence it was more user friendly.

Also the market competition was mainly based on a specific industry for example Sell.do is a CRM that is specifically based out on the Real Estate industry, whereas NPF (No Paper Forms) is a CRM that is only targeted to the education industry. Where as LeadSquared was a product that satisfied the needs of multiple business verticals due to its strong workflow automation which is the backbone of the system.

3. There were several methodologies involved when targeting was done for a qualified lead.

These methodologies involved looking studying the business process of the company, looking at the number of employs in the company, researching on the strength of the sales and marketing team of the company.

An additional activity that I have been doing in my place as an SDR has been looking at the clients of the company that I want to select as a prospect and the market capitalization

4. And clients of ours in the same field. This gave me an edge in generating better quality leads. A key part of the company was also contacting the right person in an organization. This person is from a similar background and has a decision-making ability. The approach used by me to was a top down approach. It involved contacting the CXO'S of the organization and then going down the hierarchy based on the decision-making abilities.

The most preferred point of contact was often a CIO(Chief Information Officer), however it varied in different business verticals. Often the Head of Marketing was a suitable point of contact as the system would benefit him the most. Other point of contacts were often Head Sales, Co-founders, Managing Directors, CRM head.

5. To analyze the user behavior LeadSquared platform has a feature called the LeadSquared Dashboard which can be used to arrange the Leads in a pattern suitable to the user of the engagement score of the Leads.

A Lead is given an engagement score on the basis of multiple criteria's which can be selected by the organization. The ones selected by me were a Leads participation in webinars, his actions of the Paid per click advertisements, Response to mail etc.

This helped me in knowing which leads I could contact first in order to increase my chances of closure. The Dashboard also gave me an idea of what subject mails does the lead go through the most and gave me a small understanding of the requirement and interest of the user.

6. Lead Generation was done by both the sales and the marketing department in different ways. The marketing department focused on grabbing more attention of the users and hence create inbound leads where as the Sales development team had the responsibility of generating more outbound leads.
7. The methods that I adopted in generating leads gave me an edge over the other ways of Lead Generation as I was able to generate leads of better quality through the filters I had set in my method and also was able to focus on my strengths. Hence giving better leads that marketing department where a lot of Leads could be of low quality which might not bring as much revenue to the company. I also attended events where I met with the cofounders of multiple start ups and was bale to generate good quality leads there as well.

## **Targets**

As a part of the sales development team at Leadsquared our target was to get 11 qualified meetings per month with potential buyers who have a requirement for our platform and whose sales and marketing problems can be solved using the Leadsquared platform. The criteria for qualification of a meeting are as follows:

- The prospect company should have a minimum of 15 people in their sales and marketing team.
  - The meeting should be arranged with a decision maker from the prospect company.
  - The company should have the budget and willingness to buy the platform.
  - The problem the company is facing should be such that it can be solved by the Leadsquared platform.
- Only if the meeting we had arranged for satisfied all these criteria then it would be counted as a qualified meeting.

## **LITERATURE REVIEW**

### **Basic Idea**

LeadSquared is a tool which finds its application in diverse industries. The basic idea about the platform is sales automation of various business. Therefore, wherever the sales and marketing team is present, LeadSquared finds its application in that fields. LeadSquared platform helps in high velocity sales for a business. It completely aligns with the vision of the companies of digital transformation of their sales and marketing cycles, right from where the lead is captured into the system to its conversion. LeadSquared or LSQ stands out because of its super user-friendly and exceptional support for sales and marketing transformations

### **Theoretical discussions**

#### **LeadSquared in varied applications**

The product, LeadSquared is a Sales Acceleration and Marketing Automation Platform categorized under CRM software category and through different customizations, has a variety of use-cases like Vendor On-Boarding, Recruitment, Admissions, Training Placements, Booking Management, Real Estate Management, Loan Management, Hospital Inquiry management, Power system , customer management and advertisement sales.

#### **LeadSquared in Education industry**

Admissions/Marketing team rely on multiple sources (student activation events, brokers, third-party websites (Shiksha etc.) - LeadSquared will helps identify the most profitable sources for mapping each closure back to the source. It will also enable to see which sources are non-productive because they might be giving leads but no closures.

Above describes the workflow of education industry, which enables us to fix the fitment of the product much easily. Knowing the workflow of industry makes it much simpler to communicate the process to the potential prospects. When explaining the product to the director level authority of the college and schools, exact keywords needs to be pitched, so that a mutual understanding develops between the two. To fit in such a workflow, we design a specific algorithm for them, which will ease their operational activities. Below given is a short example of automation for scholarship application Program.

In this automation as conveyed through the flowchart, if a student navigates through the scholarship program then an automated email will be sent to the student. If the student is genuinely interested, he will open the mail and then next automation runs which sends him the final invitation for scholarship. Similarly, if the person is not interested, he won't open the mail, and a not interested automation will follow him, which will keep engaging him for another program and offers. Therefore, ample time of the admission department is saved and consecutively ROI is in increased.

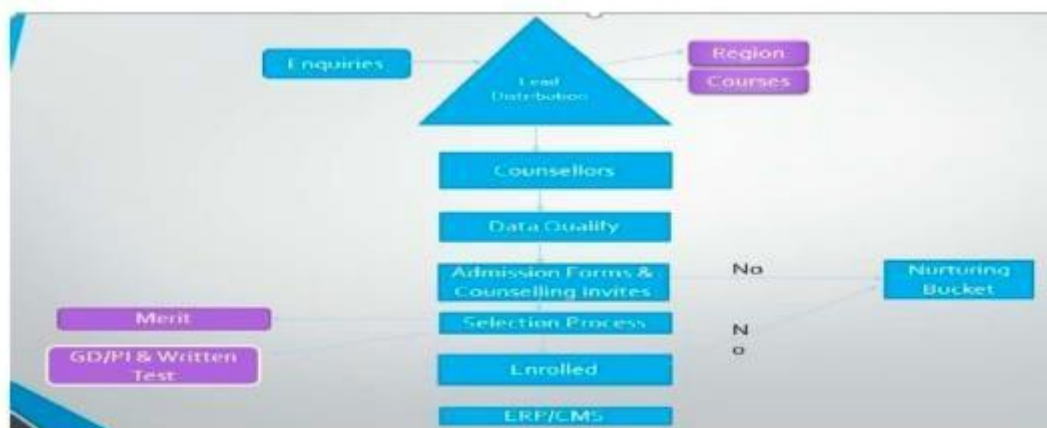


Figure 2. Workflow automation for Education industry

### **LeadSquared in Hospitals**

A LeadSquared hospital platform can become centralized healthcare hub data to manage different data streams. This comprises communications, analytics, and other reactive patient collaborations. This improves healthcare associations to create an enthusiastically engaged customer base involved a alliance with healthcare professionals across the period.

The LeadSquared platform has open APIs and can easily connect with organization's social media pages as well as third party pages. After that it communicates and sends them email according to the set automation.

### **LeadSquared and travel Industry**

Tourism sector plays a important role in service sector. The features of services intangibility of the service performance, greater involvement of the customer in the creation of the facility, complexity in retaining quality command and requirements, and the importance of the time factor as consumers limit the extent of time. In directive to keep their customers gratified and preserving operative associations with them the travel company have to decide about scope of the services and facilities

they will make obtainable to their clients. This can be achieved having knowledge about customers inclinations, develop and layout facilities that suit those predilections, inform their customers about their services, suitably price them and deliver them slickly through a well-established network.

LeadSquared through its machine learning feature can track the behaviour of the tourists searching to book hotels, flights etc. With help of such analytics LeadSquared helps travel organizations such as Make My Trip, Goibibo discover what their customers are exactly searching for. This enables them to increase the opportunity to cross-sell and up-sell depending on the customer needs. Below is explained a flowchart on how travel industry works.

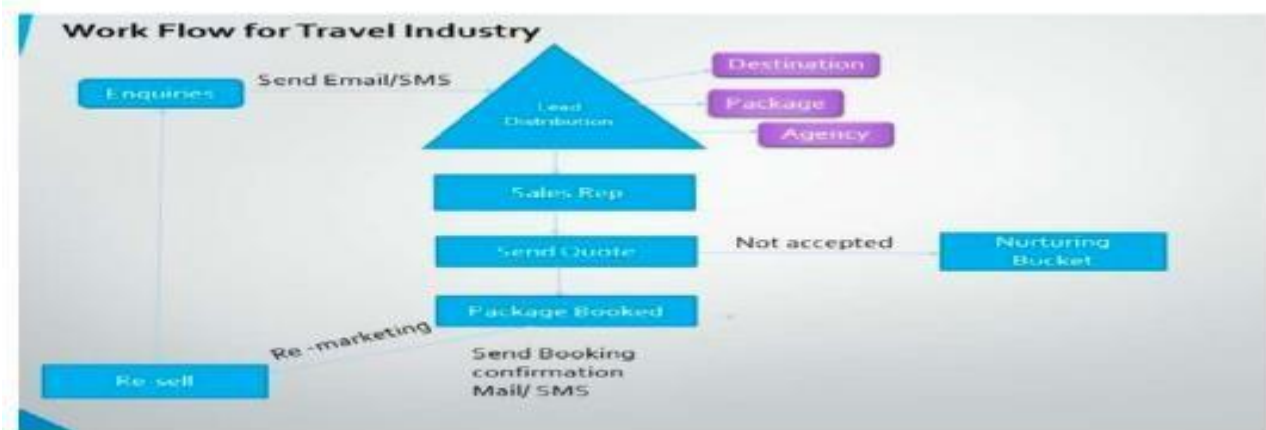


Figure 3. Workflow of Travel Industry with Lead Source Information

A lead is created whenever a customer signs in and lands on company’s website. Therefore, the automation follows whatever suits best according to the action of the lead. The automation can be set manually or through the smart technology which is machine learningbased.

## LeadSquared and Finance Industry

Banking CRM uses data and diagnostic tools to secure the client focus. Improved Profitability CRIVI enables financial institutions to give employees better training that supports them face customers more easily. It accomplishes better structure and eventually provides to better overall performance. Customer dealings are developing even more important for banks as market conditions get stricter. There is high Competition, margins are eroding, customers are becoming more demanding and the life cycles of products and services are shortening dramatically. Below explained is a workflow of finance industry:

LeadSquared as a platform has solved the loopholes and ease the documentation process through its mobile apps ability to track activities. Below is an example of an automation process which has helped a loan company to close deals much faster.

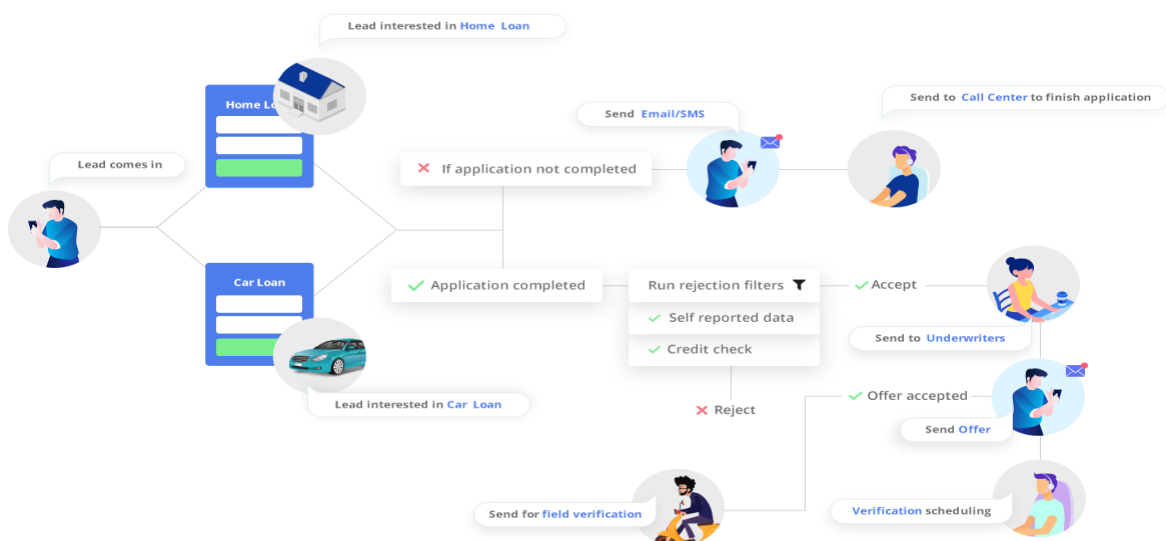


Figure 4. End-to-end loan application management with Process Designer



## LeadSquared and Real Estate

As CRMs display lead behavior, agents can easily scan the system to see what listings users liked the most or on what part they clicked in email newsletters. Rather than making a guess at what someone wants or needs, agents have precise information that lets them make informed decisions and provide high-quality customer service, turning more leads into clients.

Real Estate leads are very crucial because each lead has a very large ticket value and if that is not attended by the sales representative, it can lead to lose of large value of amount. Therefore, such automations for real estate is boon to them.

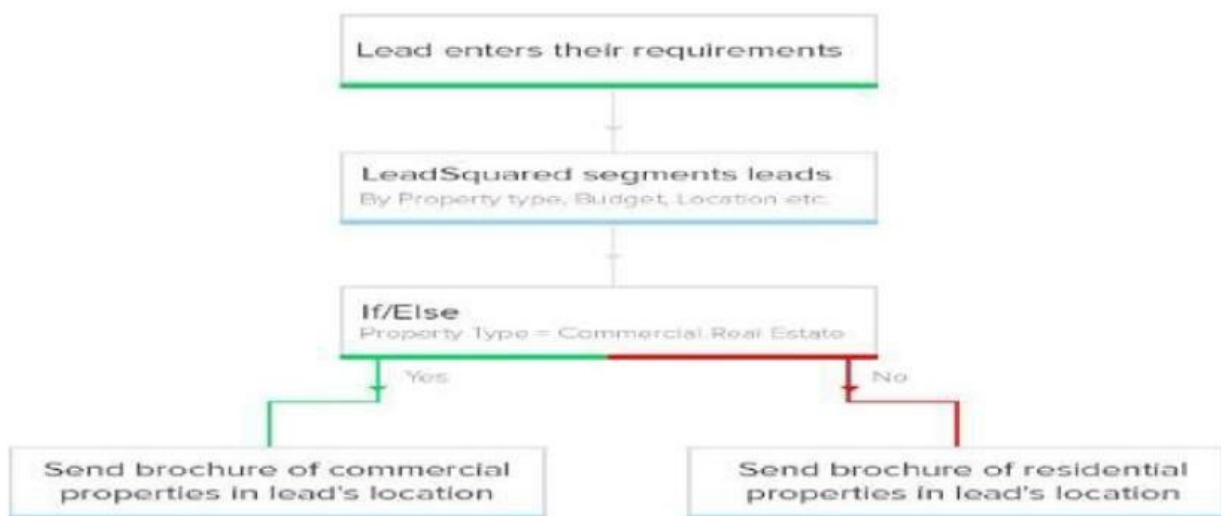


Figure 5. Automation for real estate sector

## **Working in the entertainment industry**

Broadcasting media companies and publishers are operating in an extremely volatile competitive environmental segment which has seen substantial changes in the past few years. Leading companies in media entertainment sphere are aiming to amalgamate, consolidate and modify their business models and revenue streams to adjust to changing customer preferences and challenges in the new economy.

As a part of my market research, I found the use case of LeadSquared in entertainment industry to streamline their channel for advertisement sales. Entertainment channels podcasts such as Radio, TV channels, Newspapers, c-papers source their major source of income from advertisement sales. Thus, to streamline the leads of the business which these organization target, they require a lead management system.

Below described is a working model of sales process in a B2B entertainment industry in the above process, the leads for the business are created either through market research or through outbound phone activity. After leads are generated, they are passed on to the mangers who handle the leads who in turn follow up on the leads and qualify the lead so that move down the funnel. If the leads are not qualified, they are termed as junk leads which are further nurtured through automation which is discussed in the next chapter. The qualified leads are then passed further down to sales representatives till the time deal is closed.

The LeadSquared automation was designed to fit into this system:

This automation is a subset of the entire designed system. If a lead downloads a wallpaper, the details of the lead such as its name, email, contact no are cafrom its IP address and thus an automated mail is sent to the prospect With the aid of LeadSquared email tracking , it is determined if the prospect has opened the email or not .

Different automations are further designed according the course of action of the prospect.

## **General analysis**

Thirty-nine percent of companies that have incorporated CRM platforms cite their data as a competitive advantage or a strategic asset. With a CRM system, most corporations see a considerable expansion in leads, sales revenue, and customer holding.

Gartner has predicted that by 2021, CRM will be the single largest revenue area of spending in enterprise software. If your enterprise is going to last, you know that you ought a approach for the future. You have goals for sales, business objectives, and productivity. But getting up-to-date, reliable information on your progress can be tricky. How do you translate the many streams of data coming in from sales, customer service, marketing, and social media monitoring into useful business information?

A CRM system can give provides a strong outline of your customers. You can see the whole thing in one place — a straightforward, customizable dashboard that can tell you a customer's prior history with you, the status of their orders, any outstanding customer service issues, and more.

## **Summarized outcome of the literature review**

User engagement is a business communication connection between an external stakeholder (consumer) and an organization (company or brand) through various channels of correspondence. This correlation can have a consequence, interaction, effect or total customer experience, that takes place online and offline.

The tenure can also be used to describe customer to customer communication concerning a communication, product, service or brand. However, the latter dissemination originates from a business to customer interaction resonated at a subconscious level. Therefore, LeadSquared's usage in various industries solves multiple issues or diverse industries.

## **OBJECTIVES**

### **Main Work Objective**

The main objective of the work was to set up a meeting or demonstration with an employee of the company who can be a decision maker like CEO, CTO or with someone like head the departments of the company like Sales, Marketing, IT, CRM, Call centre, and Business Development who can further carry the discussion with a higher decision maker. This work also includes qualifying meetings. For example, making sure company has at least 10 sales or marketing users and has a high lead volume.

### **Secondary Objective**

Secondary objective was to do market research. One needs to do proper market research and find quality accounts and relevant POCs to get a qualified meeting out of the interaction. This is done using various tools like Lusha, Mr E, Sales Navigator and platforms like LinkedIn. A proper User behaviour and engagement pattern needs to be studied using LeadSquared and LinkedIn. Relevant approach to the POCs needs to be taken. And in case no POCs of a company are available on the platforms, board line needs to be contacted and relevant information is obtained.

## **METHODOLOGY**

### **Introduction**

Sales Development is one of the most important processes in an organization and acts as the first point of contact for every prospect. Being an SD requires an art to figure out the right prospects, engage them and at the end of day, generate qualified meetings for the sales team. Further, BD takes over for the rest of the sales process.

You need to have good idea about tools which can help you in market research. Finding the contact details like phone number and emails of decision makers of enterprises isn't an easy task. You must know about certain tools like Lusha, Hunter, etc. which help you in getting the contact details. Also, you must be profound in the style of developing your invitation to connect messages on LinkedIn so that an influential person or a decision maker considers accepting your request on LinkedIn. After getting the contact details, one must know the art of cold calling and generating the interest of your prospect in your product or service. And it was not just about setting up a meeting or the demonstration. It was also about qualifying the demonstration and the meeting. Several guidelines must be followed to make sure the demonstration is qualified, and the company might hope generating sales with respect to that prospect or company after the meeting.

### Proposed Solution

Sales Development is one of the most important processes in an organization and acts as the first point of contact for every prospect. Being an SD requires an art to **figure out the right prospects, engage them and at the end of day, generate qualified meetings for the sales team.** Further, BD takes over for the rest of the sales process. The entire process of sales development fits into the following

diagram:



Fig 6. Workflow of SD Process

The overall process of sales development starts from the moment of lead generation until qualified meetings are generated. As a part of my project, my major function was to generate qualified leads which I could work upon and design a suitable automation which could solve the business process of respective clients.

The automation which was to be designed for the client's business had the major objective of **making their marketing process streamline**. Every business need to successfully market their products and services. Marketing is a critical tool for establishing awareness, attracting new customers and building lasting relationships. When done efficiently, **marketing can improve boost your sales and determine your competitive advantage**. The main solution which was proposed by me was developing a nurturing theory for dead or non-qualified leads. If, for example 100 leads land on an organization from all the possible sources (such as website, social media, third party websites, telephony, chat box and others), only 30 gets converted . An automation can be assigned such that the remaining 70 per cent of the leads will be sent marketing campaigns depending on their activity history. This ensures that all the leads will be in contact and have the probability of being converted to a client one day. This kind of theory works brilliantly for real estate and hospitals where each ticket size id huge and can make a drastic change in revenue.

## Design & Modelling

### Prospecting

The procedure of detecting the names and phone numbers of prospective clients. Once, an organization is discovered to have a potential fitment of our platform, relevant contact details of high-

level employees at the organization are obtained.

**Pre-Qualifying Prospects-** Pre-qualifying a prospect is the art of determining how much of your time and energy that prospect is worth in relation to reaching your sales goals. Different tools are used for prospecting such as:

**LinkedIn sales navigator** -To completely obtain the background of the CXOs. This is necessary as to communicate with them you should know about their work.

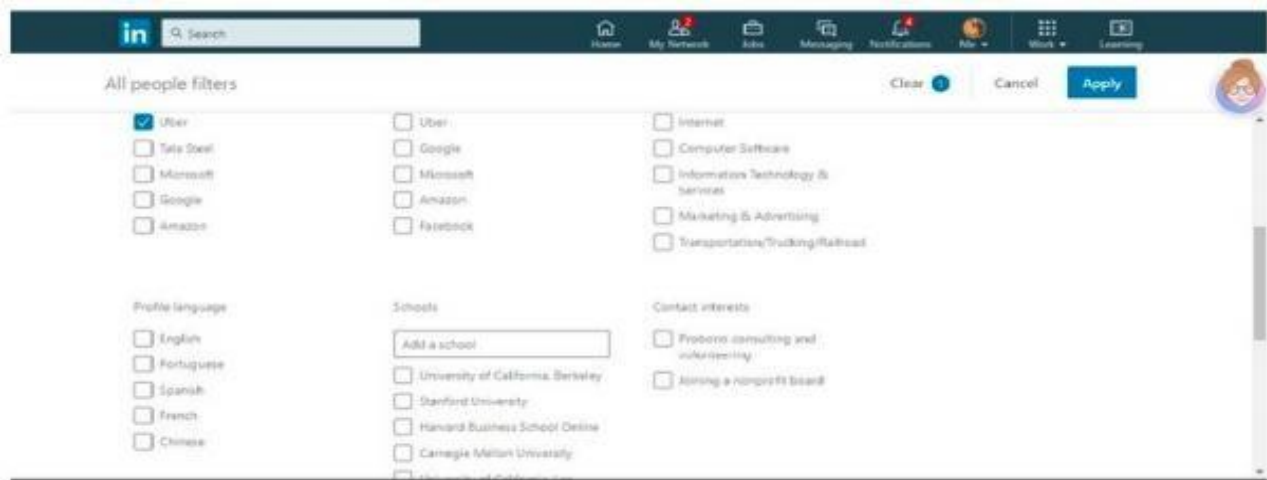


Fig 7. LinkedIn Sales Navigator

Sales navigator gives you deeper insight such as the employment history of the prospect, his experience, contribution to his organization and the role of decision making in the sales process. It also has a column where it suggests that how many people this prospect can introduce us to. This feature becomes important for relationship building, a sales process needed at later stage of sales development.

**CrunchBase** -This is a platform which will give you details about each company's background, from no of employees to the funding it has raised. Every minute information about the organization helps to target it more precisely.

### **Mailing / Cold Calling**

There are two formal channels to communicate to corporates which are mails and cold calls. These steps form the footprints of sales process. The procedure of telephoning prospects, pinpointing the decision-maker and pre-qualifying defendant accounts. It is the solicitation of company from prospective customers who have had no previous contact with the salesperson organizing the call. It is an endeavor to persuade potential customers to acquire either the salespersons product or service. Cold calling is the engine that makes the automated sales approach work. The phone is the fastest way to quickly talk to alot of contacts. This all adds up to cold calling.



## **Relationship Building**

The processes of solidifying a long-term relationship with a prospect that is built on trust and good account maintenance.

## **Module Specifications**

The process of convincing a potential client that we have a reasonable solution that will meet his or her needs. Understanding the value of the client and his pain points becomes extremely important in sales functionality. The major marketing solutions which are proposed are:

- Capture Leads: Seamless lead capture from all sources inbound email, online campaigns, Introduction to the company phone calls, website, blog, chat, webinars, lead generation websites and more.
- Nurturing dead leads: An automation can be assigned such that the remaining 70 percent of the leads will be sent marketing campaigns depending on their activity history.

Below flowchart is an example of how automation was designed for Radio Mirchi to help his salesperson target better:



Figure 4.2: Lead Nurturing Automation

- Sales Funnel - Vision your leads through various phases in sales cycle and monitor lead engagement at each stage.
- List engagement- the organization can easily find how engaged a lead is by looking at its engagement index. They can use it to rate your list quality, and own nurturing efforts. Insights on can be generated in whichever step needed. Below is a pictorial representation of a mass of leads.
- Lead funnel- the organization can easily determine which lead stages are all their leads in, and how engaged are they with their brand They can plan brands engagement strategies accordingly. Below is a funnel representation of lead stages.

These features and solutions are presented to the client as the benefits which their organization would gain after successful implementation of LeadSquared.

**Tools Used: Using LeadSquared (software) for sales activities**

As the platform LeadSquared is designed for salesperson, the sales department of Lead- Squared uses its own platform for efficient sales process. LeadSquared is a complete Customer Acquisition Platform helping small and medium businesses drive revenue by aligning their marketing and sales activities. Here is what you can achieve with LeadSquared:Lead Capture Automation:

- Responsive Landing Pages - Increase traffic to client conversions from all your client generation campaigns, using mobile responsive landing pages.
- Responsive web forms - Convert any web page into a lead capture page by creating and embedding responsive web forms.
- Website Widgets - Create more leads from your current website traffic using website widgets.
- Seamless lead capture from all sources inbound email, online campaigns, Introduction to the company phone calls, website, blog, chat, webinars, lead generation websites and more.
- Lead Distribution- Distribute leads built on city, product or any other regulations to cut down the reaction time.

**Marketing Automation:**

- Drip Marketing - Engage your prospects and sell round the clock with drip marketing and trigger-based emails.
- Segmentation- Section your contact lists for lead fostering based on lead scores, behavior, geography, or any beneficial variable.
- Personalized Email SMS Campaigns - Create and retain mindshare of your leads and customers by sharing highly personalized relevant content using email and SMS.

## Sales Acceleration:

- Automated Lead Scoring - Identify your prospects with the highest potential for sales conversion with automated lead engagement scoring.
- Behavioural Insights - Empower your sales to close deals faster with powerful behavioural insights and detailed activity history for every lead.
- Sales Funnel – See your leads throughout different stages in sales cycle and observe lead engagement at each stage.
- Improve sales efficiency by setting tasks reminders Marketing, Sales and Revenue Analytics
- Lead Engagement Index - Get measured engagement perceptions for any section or group of leads.
- Marketing Insights - Deep insights on campaigns, lead sources, landing pages and keywords driving qualified leads for your business.
- Sales and Revenue Insights - Get clarity on factors that drive your revenue. Analyse lead source performance, sales users' performance, product and services recording the best sales, and other sales insights.

## **Summary**

Today's customers are spoiled for choice. Marketing utilizes interaction and promotion methods to persuade customers that your brand, including your products and services, are exactly what they need. Even though you are marketing your brand, every aspect of your marketing strategy should focus on satisfying the current and future needs of your customers.

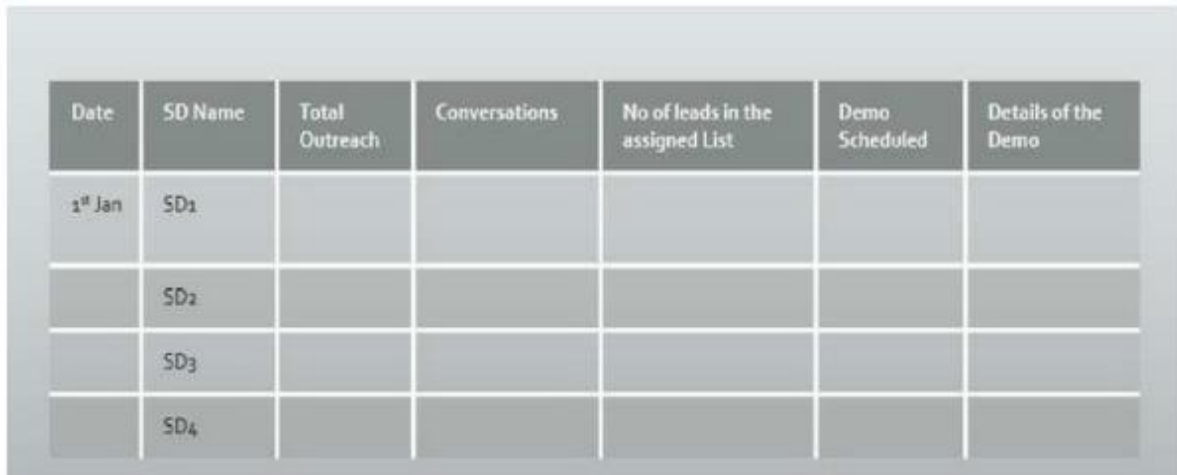
Marketing is a crucial aspect of any business and requires research, time, planning, and appropriate budget allocations.

In this we have used the above channels of marketing and concluding by determining the effectiveness of each and classifying them in order of reducing effectiveness in terms of driving user engagement.

## Results & Analysis

### Result analysis

Results were directly based on no of demos or qualified meetings an intern can pull out. The activities are tracked every hour, every day, and every month. The table below shows how our activities were assessed each day.



Date	SD Name	Total Outreach	Conversations	No of leads in the assigned List	Demo Scheduled	Details of the Demo
1 <sup>st</sup> Jan	SD <sub>1</sub>					
	SD <sub>2</sub>					
	SD <sub>3</sub>					
	SD <sub>4</sub>					

Figure 5.1: LeadSquared daily wise measurement

**SD<sub>x</sub>**: Indicates the rank of Sales Development Executive Total Outreach Total no of mails +Calls an employee has made

**Conversations**: No of one-to-one interactions an executive has per clay No of leads assigned in the list: Total no of leads assigned by the manager at the beginning of the day

**Demo Schedule**: Total no of demo or qualified meetings which an executive could pull outper day

**Details of the demo**: This column should contain the name of the company and otherparameters such as use case, no. of users, etc.

The assessment of our leads journey and the time till it gets converted could also be analysed from LeadSquared metrics. These metrics become very useful in planning of the next steps that needs to be executed for the same. Below given in a screenshot of LeadSquared metrics:



Figure 5.2: LeadSquared metrics for leads

## Comparison

The executives were assessed monthly based on the total no demos they could pull out in a month which the organization can work with in future.

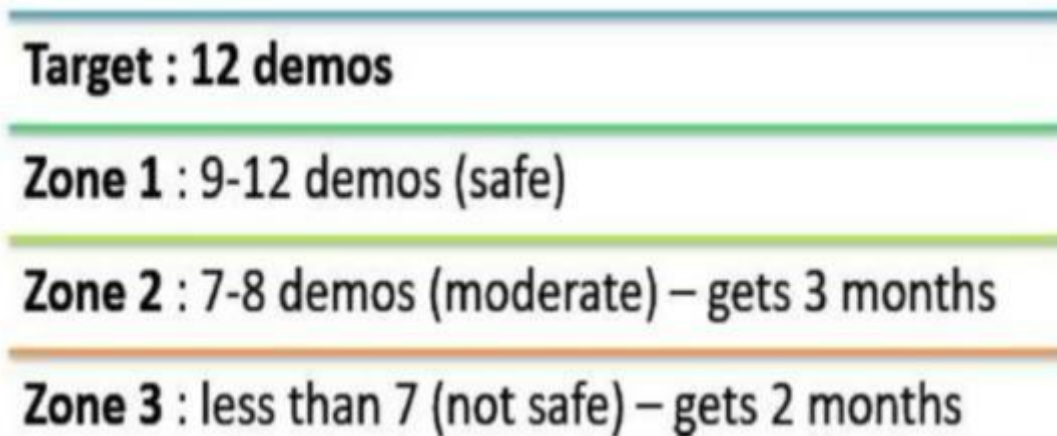


Figure 5.3: Comparison parameters

Each person is allotted a target of 11-12 demos per month and MRR pipeline of 3 Lakh Rupees per month. The zones described above suggests the targets and the necessary actions against the bracket of demos pulled out. For quarter wise measurement, number of demos or deals closed in a particular zone. MRR generated in a month: MRR stands for Monthly recurring revenue.

As LeadSquared is a subscription-based model, after the deal gets closed, the client has to pay a certain amount of monthly subscription to use the features.

## **Summary Of Internship**

The main Highlights of the internship are primarily focused on two of the main environments and domains of work and agenda. The first that is a passive, but continuous process belonged to the domain of sales and sales function. In this, with variety of client companies and with their varying demand and the approach that was adopted and the skills that were exercised can be summarized as the following:

1. Regular Client course analytics which were made daily were of the utmost significance since it represented client-rep and user engagement both is a dashboard layout and helped corporate POCs as well as internal reviews of the course.
2. The collaterals and deliverables that were sent to the client at the beginning/launch of any new module or course was very useful to make a systematic and more detailed approach that gives both a smooth internal work plan as well as an assuring flowsheet for the client.

For the second part of the internship, Marketing Strategies were the main goal and domain of work and agenda. The results obtained clearly showed that Tables and analytics were the most efficient way and channel of marketing with respect to the company of internship.



## **6. CONCLUSION**

To conclude, LeadSquared is an effective tool to enable businesses to grow their revenue through increasing conversion rates, smoother functioning of organization, reduction of response time and creating personalized experiences for prospects. In the coming months, we hope to add new use-cases and tailor the platform for Pharmaceutical and Retail Industries, helping them solve numerous problems in their current process and reaching out to maximum group of society.

In the manufacturing and automotive industries, dealing with vendors, dealers and retailers is of extreme importance. LeadSquared can optimize such given processes for these industries. The data fed through cannot be scaled but gives a very clear picture and hence a very intuitive understanding. We intend to utilize these proposals into the other fields and we can reveal that by replication we can actually examine the difference between the theoretical and practical values.

## REFERENCES and WEBSITES

1. <https://www.leadssquared.com/>
2. 7 Signs That Your Business Needed a CRM Yesterday.  
“<https://www.entrepreneur.com/article/318988>”
3. CRM Software built for high velocity sales“<https://www.leadssquared.com/crm-software/>”
4. End-to-end Marketing Automation Software “<https://www.leadssquared.com/marketing-automation/>”
5. Customer retention strategies “<https://buildfire.com/customer-retention-strategies/>”
6. Van Doorn, J., Lemon, K., Mittal, V., Nass, S., Pick, D., Pirner, P. and Verhoef, P., “Customer Engagement Behavior: Theoretical Foundations and Research Directions. *Journal of Service Research*: 2010;13(3), 253-266.

