



Partner Lead Management

The Partner Lead Management module of ZINFI’s partner relationship management (PRM) platform enables your organization to distribute leads to your partner base and manage the complete “contacts to contracts” process. This module helps engage partner sales reps via “round robin,” “shark tank” and other lead management distribution mechanisms.

Shark Tank Management

The Partner Lead Management module allows your organization to distribute leads to different partners or partner groups based on various criteria established in a “shark tank” lead distribution scheme. Lead management data can also be synchronized with data in an existing CRM system for smooth integration between the two platforms.

Using the Partner Lead Management module, your organization can easily define a time frame for lead follow-up, including pre-scheduled system notifications at regular intervals when no activity has occurred. Pullback functionality allows a lead to be automatically pulled from one partner, in case of non-activity, and reassigned to another.

Lead	Company	Name	Title	Email	Phone	Lead Score	Email Notification	Favorite
<input checked="" type="checkbox"/>	Analytics	Brad Barber		brad@analytics.com		0	Not Notified	Yes
<input checked="" type="checkbox"/>	NetScout	Eva Bost		eva.bost@netscout.com		0	Not Notified	No
<input checked="" type="checkbox"/>	Data Inc	Samuel Bell		samuel@datainc.com		0	Not Notified	No
<input checked="" type="checkbox"/>	WFO Inc	Mike Davis		mike@wfo.com		0	Not Notified	No
<input checked="" type="checkbox"/>	Web Inc	John Edwards		john@web.com		0	Not Notified	No
<input checked="" type="checkbox"/>	Academy	Chris Evans		chris@academy.com		0	Not Notified	No
<input checked="" type="checkbox"/>	El Paso Corporation	Stephanie Fisher	Manager - Programs	stephanie@elpaso.com		0	Not Notified	No
<input checked="" type="checkbox"/>	Amel Learning Lab	Julia Walker	CTO - HR	jwalker@amel.com		0	Not Notified	No
<input checked="" type="checkbox"/>	Cloud Analytics	Samuel	Product	samuel@cloud.com		0	Not Notified	No
<input type="checkbox"/>	StarSource	Matthew Seale	Manager - IT	matt@star.com	1800-850-2729	40	Not Notified	No

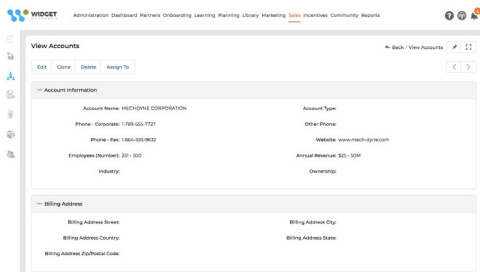
Key Features

- ✓ CRM Connectors
- ✓ Lead Upload & Tag as Favorites
- ✓ Lead Scoring & Distribution
- ✓ Lead Processing & Management
- ✓ Opportunity Management & Deal Registration

End-user Account Management

With our Partner Lead Management module, your organization and your channel partners can manage the entire journey of a prospective lead from generation to close through an automated system. This automated sales approach encourages partner engagement and yields enhanced productivity.

The Partner Lead Management module also includes functionality to formulate and apply global lead scoring rules and track leads based on their age. This helps users quickly sort leads and logically prioritize follow-up activities. Organizations can easily configure system alerts to generate automated notifications to users on schedule dates and at scheduled times.



Key Features

- ✓ Lead Records Upload & Batch Update
- ✓ Global Lead Scoring Rule
- ✓ Lead Conversion
- ✓ Activity Tracking
- ✓ Notes & Task Association

Opportunity & Deal Management

Auto-capture and easily track history of all campaigns that have marketed to a Lead and the engagement status for a better Opportunity and Deal conversion rate. UCM's Partner Lead Management module is utilized to set up an automated review and approval mechanism for all submitted opportunities and deals completed by the channel sales team. The module also allows you to push submitted opportunities and deals submitted to your internal CRM through configured system connectors.

The dynamic reporting engine of the Partner Lead Management module provides clear insight into the every level of the sales funnel created by your channel sales team. Individual channel partners can also track their own sales activity progress by reviewing their individualized progress dashboard.

Select	Deal ID	Deal Name	Amount	Deal Stage	Amount	Expected Close Date	Status	Partner
<input type="checkbox"/>	8719_2010	Sanjour-IBM-Widget	100	10 - Closed Deal	\$ 100	8/19/2010	Ready for Submission	Yes
<input type="checkbox"/>	8719_2010	New Opportunity	100	10 - Closed Deal	\$ 100	8/19/2010	Ready for Submission	Yes
<input type="checkbox"/>	8719_2010	Widget Products 10	\$ 100	10 - Closed Deal	\$ 100	8/19/2010	Ready for Submission	Yes
<input type="checkbox"/>	8719_2010	Widget Deal	\$ 100	10 - Closed Deal	\$ 100	8/19/2010	Ready for Submission	Yes
<input type="checkbox"/>	8719_2010	Widget Products 10	100	4 - Qualified	\$ 100	10/27/2019	Ready for Submission	No
<input type="checkbox"/>	8719_2010	Widget Products 10	Thoughtworks	100	10 - Closed Deal	10/27/2019	Ready for Submission	Yes
<input type="checkbox"/>	8719_2010	Widget Deal	100	10 - Closed Deal	10/27/2019	Ready for Submission	Yes	Yes
<input type="checkbox"/>	8719_2010	Widget Deal	100	10 - Closed Deal	10/27/2019	Ready for Submission	Yes	Yes
<input type="checkbox"/>	8719_2010	Widget Products 10	100	4 - Qualified	\$ 100	10/27/2019	Ready for Submission	No
<input type="checkbox"/>	8719_2010	Widget Products 10	100	10 - Closed Deal	\$ 100	10/27/2019	Ready for Submission	Yes

Key Features

- ✓ Lead Campaign History
- ✓ Opportunity Management and Auto calculate Opportunity-Amount Value
- ✓ Deal Registration
- ✓ Approval & Review Management

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