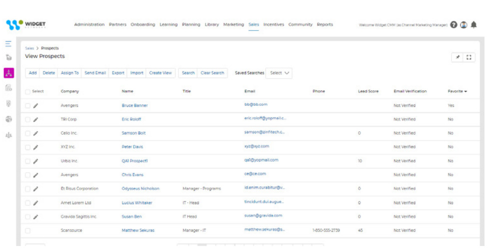
Partner Lead Management

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.



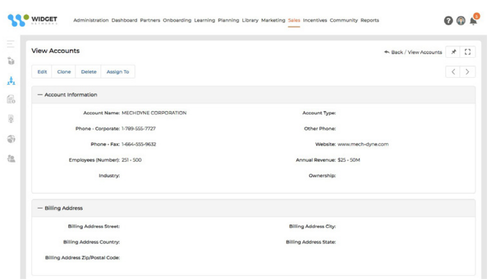
Key Features

- 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.



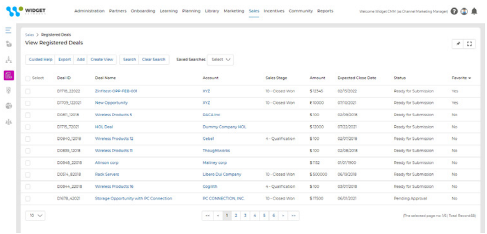
Key Features

- ✔ 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.



Key Features

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

AMERICAS
sales.noram@zinfitech.com
6200 Stoneridge Mall Road, Suite 300
Pleasanton, CA 94588
United States of America

EUROPE, MIDDLE EAST AND AFRICA
sales.emea@zinfitech.com
Davidson House
Forbury Square, Reading
RG1 3EU, United Kingdom

ASIA PACIFIC
sales.apj@zinfitech.com
3 Temasek Avenue
#21-00 Centennial Tower
Singapore 039190

Please visit www.zinfi.com/contact-us to see the locations and contact information of our other global offices.