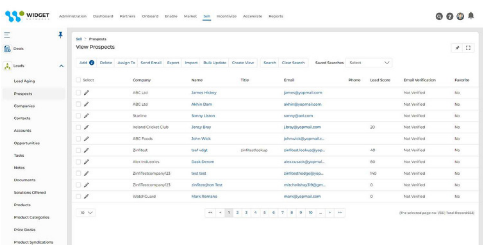
Partner Leads Management

Partner Leads Management of ZINFI's Unified Partner Management (UPM) platform enables your organization to distribute leads to your partner base and manage the complete "contacts to contracts" process. Engage partner sales reps via "round robin," "shark tank," and other lead management distribution mechanisms and utilize auto-integrated product management, aiding you in managing product and service information – an essential component for your leads.

Shark Tank Management

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

Using Partner Leads Management, 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 and display Lead Age via configurable Color Codes. Pullback functionality allows a lead to be automatically pulled from one partner in case of non-activity and reassigned to another. Account Level/Channel partner Admin Level visibility can be configured for seamless access to Leads generated/assigned to all Partners.



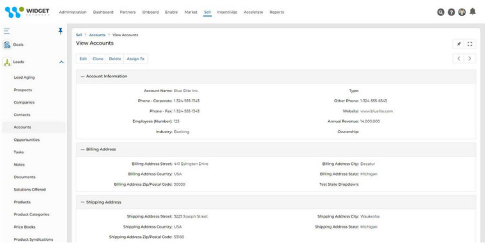
Key Features

- ✓ CRM connectors
- ✓ Lead Upload & Tag as Favorites
- ✓ Lead scoring and distribution
- ✓ Lead processing and management
- ✓ Opportunity management and deal registration

End-user Account Management

With Partner Leads Management, 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.

Partner Leads Management 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 scheduled dates and at scheduled times.



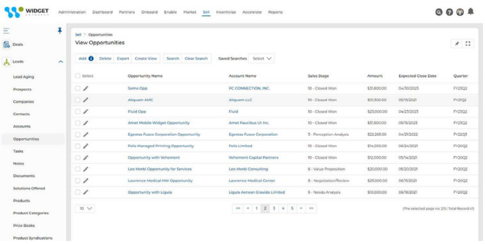
Key Features

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

Opportunity & Deal Management

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

The dynamic reporting engine of the Partner Leads Management module provides clear insight into every level of the sales funnel created by your channel sales team. Individual channel partners can also track their 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 and review management

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