How do I…follow up leads using the Sales Calls screen?

In this tutorial I will show you how to follow up your business leads using a facility designed specifically for this task, called Sales Calls.

You'll find Sales Calls on the Main Menu under the List section.

There are 3 main functions of the Sales Calls screen. The first function is following up on CVs and interviews. The second is following up call backs that you need to do today and the third function is pursuing new business by contacting clients to tell them about a great candidate.

Let's look in more detail at how you might use this screen.

Firstly, I'm going to pull up a list of clients who I want to call because I need to follow up on CVs that have been sent to a client or follow up on Clients who have interviewed candidates.

The options are all arranged on the ribbon at the top of the screen. All I need to do is click 'CVs Sent' or 'Interviews' and as long as my username is set in the Consultant box, the relevant list will be displayed in the main screen.

If you want to change the columns that are shown, click 'Set Columns' tick the ones you want and untick the ones you don't want to see. Tick 'Remember' to show the same columns next time you open the Sales Calls screen.

You'll see that the mini record and log for the clients is shown beneath the list. If you call a client now, you can add to the log straight away.

A useful tip is that if you click the candidate's name on the list, it will show you their mini record and log instead so without moving away from this screen you can see all the information you might require during a conversation.

So that covers following up on CVs and interviews, now let's look at how you would contact clients to tell them about a great candidate you are trying to market.

Again, you do pull up your list of clients to contact using the ribbon. If you click 'List My Client's you can see the full list of your Clients. To narrow down the list, you can add parameters such as by sector, segment, hot list etc.

If I want to contact all my clients in a particular segment, I would work through the pull downs until I have identified the specific clients I want to contact and then click the arrow at the end of the ribbon.

If you right-click on an entry in the list you can open the client or candidate form fully.

Using the small buttons at the top of the screen, you can do further actions. If you want to clear the current view and start again, click the no entry sign.

To arrange a new interview, click the interview icon. You might do this while you are viewing the CVs Sent if you have called a client and they have agreed to interview the candidate after receiving their CV.

You can also show the Candidate Status screen for a particular candidate or vacancy by clicking the last icon.

Finally, the third way of using Sales Calls is to display your list of phone calls that you need to make.

Go to the Call Backs tab at the top and the view will change. By default, the view always shows today's call backs but you can change this to previous, this week, +30 days or show all using the buttons.

You can also see your colleagues' call backs by changing the name of the consultant.

The delete button allows you to delete a call back and the print button prints off the current view.

If you need to move a call back to a different day because the person you're calling is out, you can drag the call back entry to another date on the calendar and the display will update.

Double-clicking an entry will open the call back entry and you can make further changes.

So now you can manage your current leads and easily contact clients to generate new business, effectively all from one screen.