Lead Management & Reporting

Who We Are

- 30 years of software innovation
- 20,000+ shareholders
- Listed on NSE & BSE
- Serving 5,000+ enterprise clients

Introduction to Lead Management & Reporting

WHAT IS LEAD MANAGEMENT?

WHAT IS LEAD REPORTING?

WHY IT MATTERS: VISIBILITY, EFFICIENCY, REVENUE

DRYZE CRM'S UNIFIED APPROACH

Why Lead Management Matters: Case Studies & ROI

Case Study 1: Acme Corp
• 50% faster follow-up → 30% lower cost-per-lead
• Result: $150K annual savings

Case Study 2: BetaTech
• 25% higher lead-to-opportunity conversion
• Result: $400K incremental revenue

Case Study 3: Gamma Inc
• 40% reduction in wasted campaigns
• Result: 300% campaign ROI

Key Takeaway: Saves cost, accelerates deals, boosts top-line

Multi-Channel Lead Capture

Web forms & landing pages

Email campaigns & list imports

Social media connectors

Live chat & chatbot integration

API & webhook feeds

Lead Qualification & Intelligent Scoring

Custom qualification rules

Behavior-based scoring

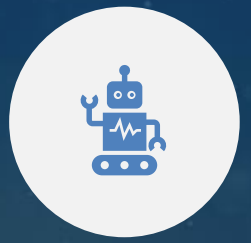
Demographic & firmographic filters

Automated lead grades (A/B/C)

Dynamic score thresholds

Automated Lead Assignment & Routing

ROUND-ROBIN & TERRITORY RULES



SKILL-BASED DISTRIBUTION

SLA-BASED ASSIGNMENTS

NOTIFICATIONS & TASK CREATION

ESCALATION WORKFLOWS

Lead Nurturing & Engagement

- Drip-email sequences
- Behavior-triggered journeys
- Personalized content blocks
- A/B test subject lines & templates
- Multi-touch attribution

Lead Reporting – Key Metrics Overview

LEAD VOLUME & SOURCE BREAKDOWN

CONVERSION RATES BY STAGE

AVERAGE TIME IN STAGE

LEAD-TO-OPPORTUNITY RATIO

QUALIFICATION VELOCITY

Custom Reports & Dashboards

- Drag-and-drop report builder
- Pre-built templates (Funnel, Source, Rep)
- Custom date ranges & filters
- Segmentation by team, region, campaign
- Scheduled PDF/email delivery

Real-Time Monitoring & Alerts

LIVE DASHBOARD WIDGETS

THRESHOLD-BASED ALERTS (SCORE, VOLUME)

MOBILE PUSH NOTIFICATIONS

SLACK/MS TEAMS INTEGRATIONS

EXCEPTION REPORTING

Forecasting & Performance Analysis

- Pipeline trend projections
- Weighted revenue forecasts
- Rep and team scorecards
- Win/loss analysis
- ROI of campaigns

Best Practices & Next Steps

ESTABLISH CLEAR QUALIFICATION CRITERIA

AUTOMATE TO ACCELERATE RESPONSE TIMES

CONTINUALLY A/B TEST NURTURE PATHS

REVIEW REPORTS WEEKLY WITH STAKEHOLDERS

ITERATE: REFINE, OPTIMIZE, REPEAT