





## Manage leads in one place

With a single lead repository, you can combine all your leads in one place and easily track them from first inquiry to the first appointment, and beyond.



Keep your pipeline organized and coherent.



Easily rank and qualify your leads to make tracking, follow up, and analysis more effective.



Allow leads to set up a consultation online booking faster and eliminating calls or missed opportunities.



 Streamline lead distribution by reassigning leads if a sales rep is ill or leaves.



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## **Build better relationships**

Simplify lead management tasks and set staff members up with management dashboards that clearly show them if a lead is due for a follow-up.



Ensure your staff has all the information they need.



Reach out at the best time possible with pre-assigned or staff-defined follow-up dates based on lead feedback.



Personalize your sales calls with lead profile notes and custom fields that track the info your reps need to make a sale.



Provide your team with fingertip access to information that drives productive conversations.

## Enhance productivity and win more sales

Gain insight where it matters most and enhance employee efficiency



Track your sales rep performance and your funnel for increased sales wins.



Automatically create lead opportunities within the system based on client activity.



Save time with one-click updates that automatically convert a lead to a client.



Automate your marketing with personalized campaigns targeted to your leads.



Stay organized with a lead management system that puts everything you need to convert all in one place.