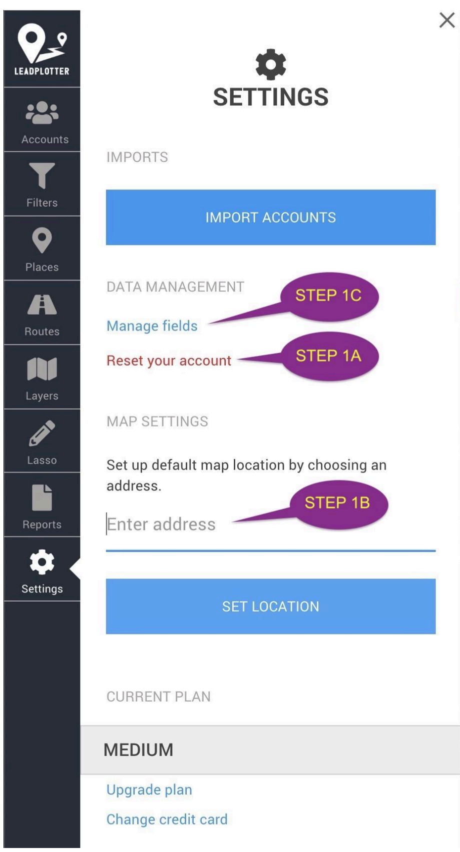
LEADPLOTTER

INSTRUCTIONS TO MAXIMIZE YOUR BUSINESS POTENTIAL

Congratulations on getting LeadPlotter to help boost your sales, grow your business and crush your competition! You're off on the right foot! You can access your account both from the LeadPlotter mobile app for iOS or Android or from any of your computers on the web.

First watch this video to get acquainted: https://www.youtube.com/watch?v=XUUUzF6vs9g

So now that you have LeadPlotter, let's get you started! This will only take less than 10 minutes and you'll become a SALES MAGICIAN!



Step #1A. Go into SETTINGS and click on "Reset your Account" to start your account for your business. Type DELETE ALL ACCOUNTS and can skip the dialog box. Come back to SETTINGS and do Step 1B.

Step #1B: Put in your "business mailing address" and click SET LOCATION. Refresh the page so the map shows your location.

Step #1C. Go to MANAGE FIELDS and add entry fields you want to track from your leads, customers or referrals.

Question For You: What important pieces of information do you wish to know, follow and track for all of your leads or clients? To get your creative juices flowing... depending on your industry, you may want to know the following: # of monthly sales, # of orders, # inventory, how many employees they have, how many referrals they send, what company/service they currently order from or refer to, types of equipment they use, Names of Receptionists, Samples Given, Welcome Packet Given, Who is the Sales Decision Maker, Met for Lunch, etc.?)

Here is an example of what “Manage Fields” would look like. Whatever parameters that are important for you to monitor and track from your customers/clients/referrals/leads, put them in here.

Existing account fields

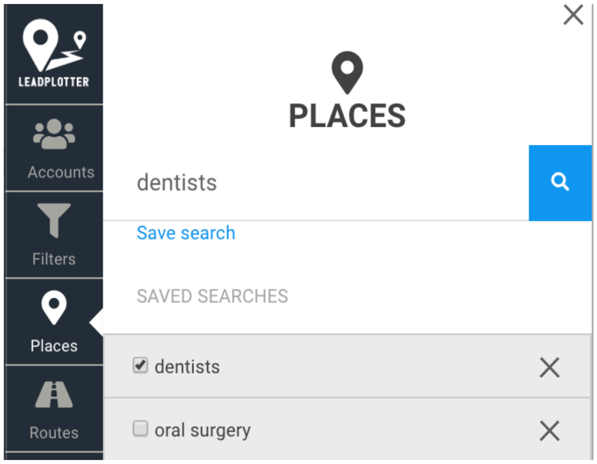
≡	Practice Type	text	☑ Filterable	DELETE
≡	Name of Dentist1	text	☑ Filterable	DELETE
≡	Name of Dentist2	text	☑ Filterable	DELETE
≡	Name of Dentist3	text	☑ Filterable	DELETE
≡	Name of Receptionist1	text	☑ Filterable	DELETE
≡	Name of Receptionist2	text	☑ Filterable	DELETE
≡	Welcome Kit	text	☑ Filterable	DELETE
≡	Gift Baskets	text	☑ Filterable	DELETE
≡	Photos	text	☑ Filterable	DELETE
≡	Referrals Per Month	text	☑ Filterable	DELETE
≡	Email for Lunch	text	☑ Filterable	DELETE
≡	Email Response for Lunch	text	☑ Filterable	DELETE
≡	Lunch Scheduled	text	☑ Filterable	DELETE
≡	Phone Attempt for Lunch	text	☑ Filterable	DELETE
≡	Referral Portal Setup	text	☑ Filterable	DELETE
≡	Name of Receptionist3	text	☑ Filterable	DELETE

Add account fields

Add new categories to your accounts

Account field name	Select data type ▾	ADD

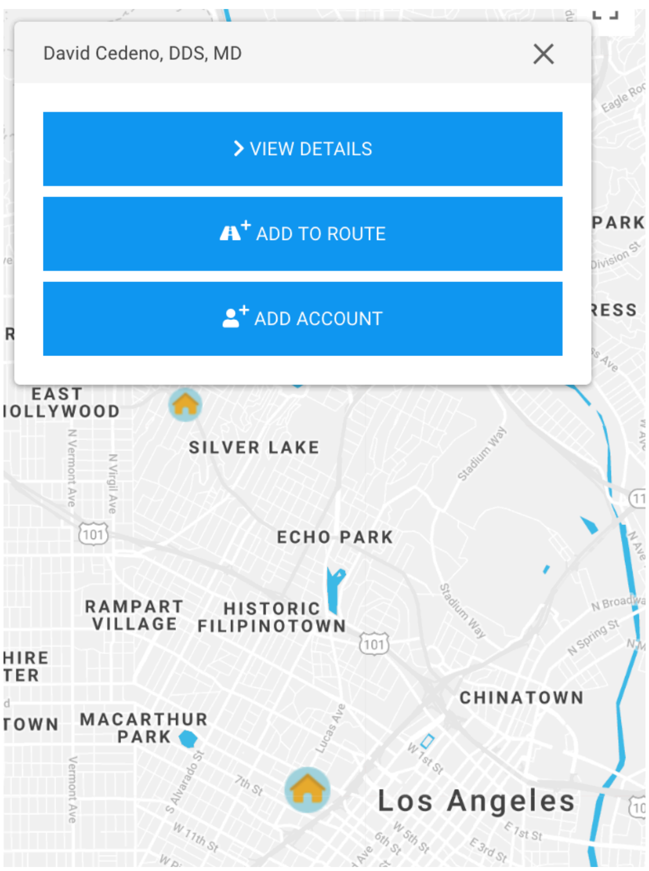
In Step #4, when you start feeding data to these fields for your clients/customers/referrals/leads accounts, you’ll then visually see them on a map under the FILTERS page (later in Step #7). You’ll have a beautiful birds eye view of all parameters that are important to you displayed on your neighborhood map. Everything you want to know about your clients/customers/referrals/leads!



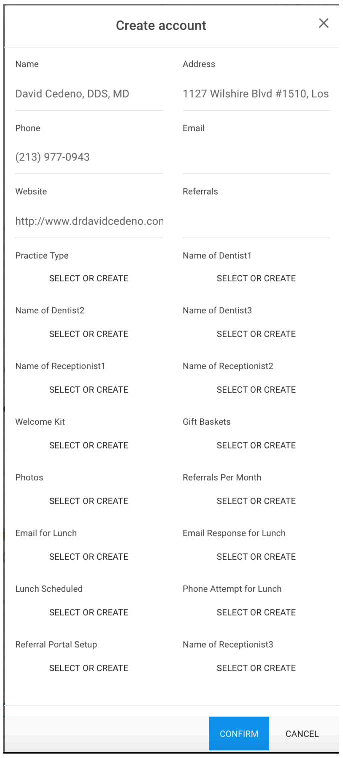
<u>Step #2:</u> Go to PLACES from the left hand menu and search for leads, customers or referrals you are trying to find and track! The results will appear as pins on the map.

Question for You: Who are you trying to find? For instance, if you are a pharmaceutical sales rep, you may want to search for "doctor" or "medical clinic". If you are an oral surgeon, you may want to search for "dentists".

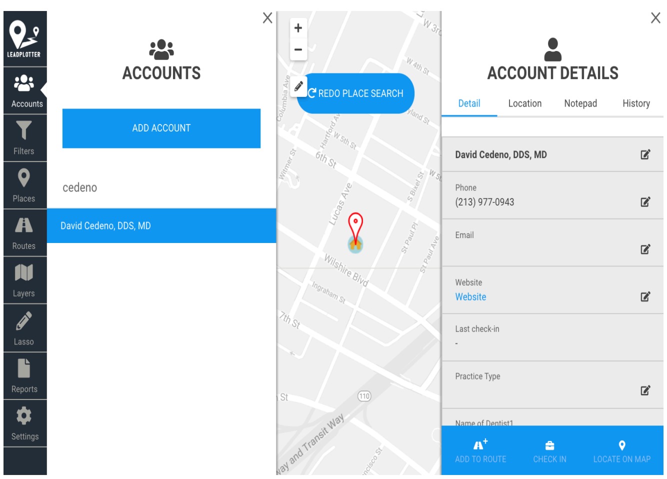
*Tip: If you zoom in the map, run the search again and it will display more pins (leads/customers/referrals). The map can show 20 results at a time, so if you move the map or zoom in/zoom out and re-run searches, it'll show more!



<u>Step #3:</u> When you do Step #3, pin(s) will show up on the map. Click on the pin and click "ADD ACCOUNT" to add it to your accounts list.

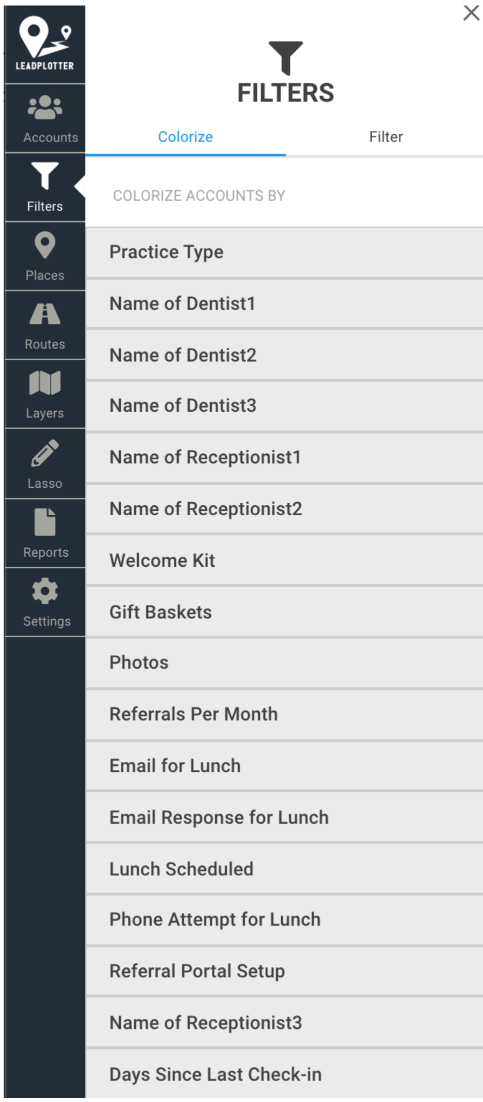


<u>Step #4:</u> Fill out information about the lead/customer/referral if you know it and press CONFIRM. You'll now be able to track this lead/customer/referral.



<u>Step #5a:</u> Go to ACCOUNTS from left menu
<u>Step #5b:</u> Search/find the account you added or is in your list
<u>Step #5c</u>:
•You can edit the account/lead/customer/referral information
•Go to NOTEPAD section to keep notes
•Go to HISTORY to browse history of CHECKINS with you and this account (and visa-versa)

Step #6: Now for the fun stuff….



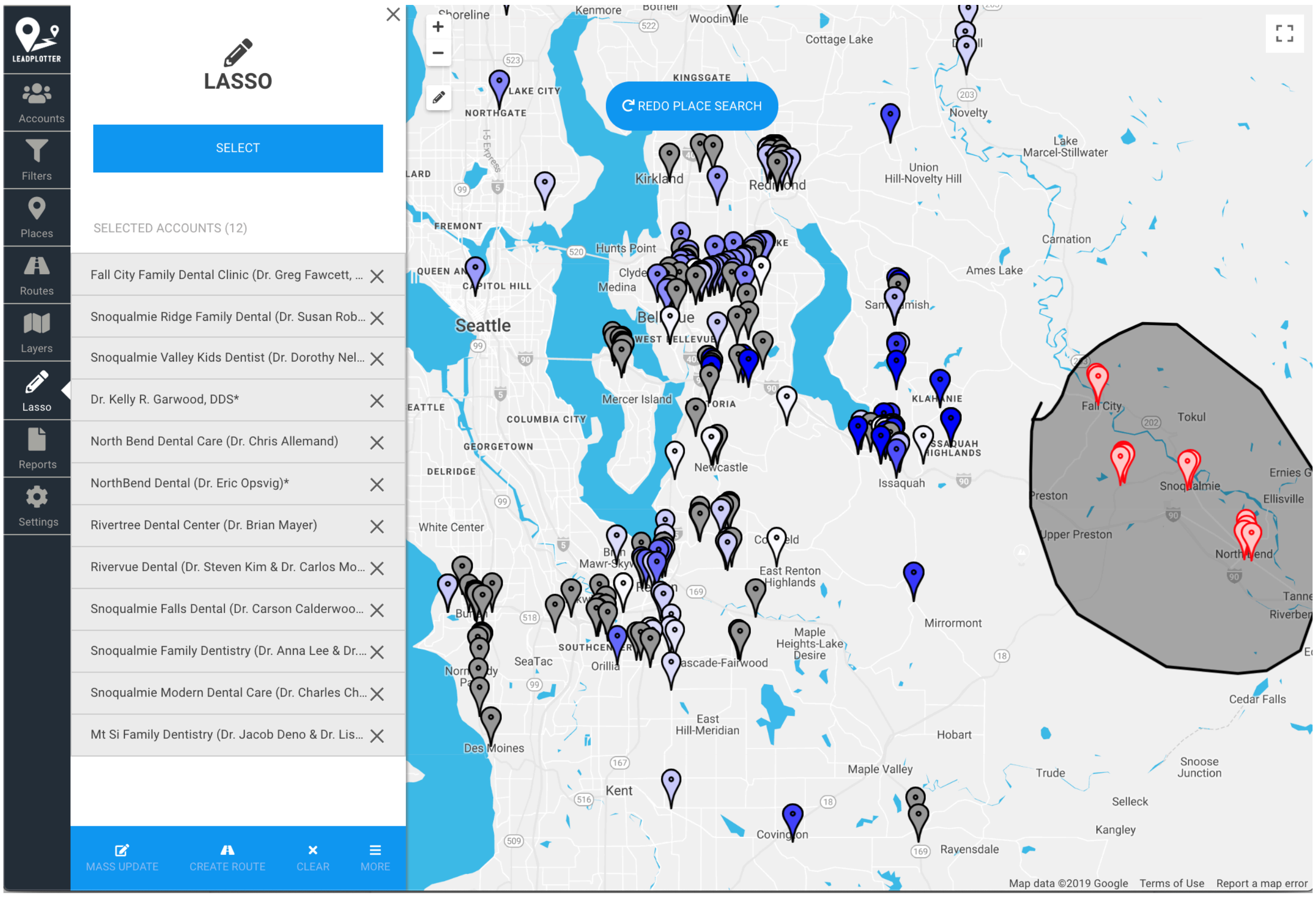
Want to see which accounts have not checked in with you or you have not followed up with them in a long time? Or want to see on a map who are your best and worst customers, leads, referrals or clients?

Step 6 lets you do that!

Step #6: Go to FILTERS tab to show on a visual map the parameters you are tracking on each account (lead/customer/referral) that were created in Step #1C.

For instance, you can click “Referrals Per Month” or “Days Since Last Checked In” and it will plot all your accounts on a map so you can see this valuable data visually!

Step 7: On the FILTERS tab, use the pencil icon to strategically select accounts you want to visit. You can also use the LASSO button from menu. You can now batch edit account information (MASS UPDATE) or add them to a multi-stop route (CREATE ROUTE). If you visit multiple accounts to give them samples or check in with them, this is a great tool! The Lasso enables you to create multi-stop routes that are optimized for traffic to help you save gas, money and time!



<u>STEP 8:</u> Create multi-stop destination routes to your accounts using the pencil icon under LASSO/FILTERS tab in Step 7. When you've created your route, put in your START and END locations in, how long you'll spend at each location and click on OPTIMIZE for system to generate your best optimal route to save time, gas and money. You'll be able to visit more places in less time!

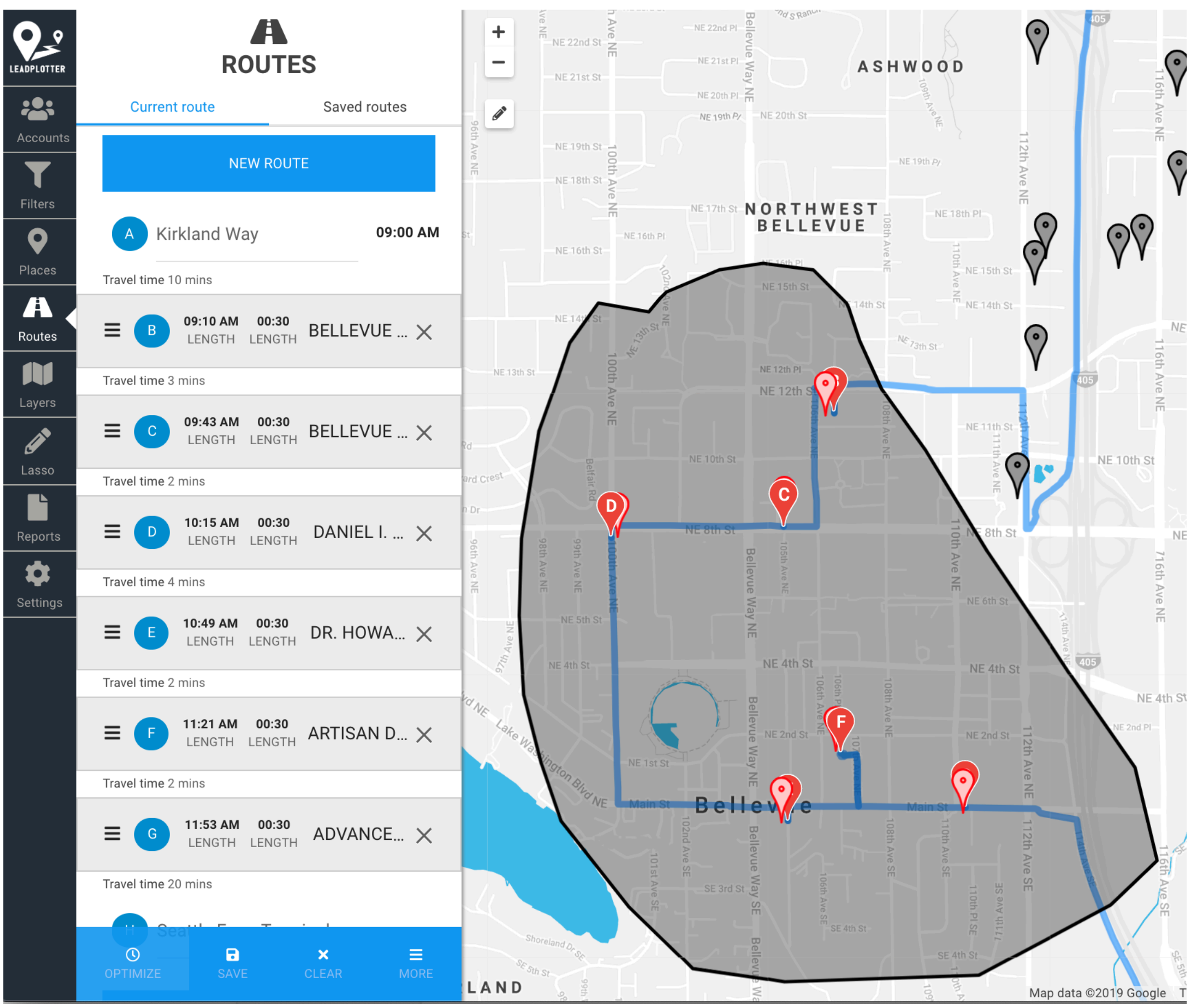
*Cool PRO tip: If you want a printout of your schedule and routes, click MORE button to create a PDF with your routes.

*Valuable Tip: When you visit the account (lead, customer, referral, client), update that account:

  *Put in information you gathered in Notes (so you can look it up later in NOTES) (this could be if the customer is going on vacation, has pets, has kids, etc.)

  *Do a CheckIn (so you can track it later under HISTORY) so you know which accounts you have visited recently and which ones you've neglected

  *Update any parameters you are tracking (those created in STEP #1C)



Congratulations! You’re now a LeadPlotter expert! You’ll start seeing results in your sales and business! Email us at hello@LeadPlotter.com for any questions!