



Welcome To Your New CRM

Website:

www.SaturnPros.com/public

Username:

firstnamelastname

Password:

Welcome To Your New CRM

Terminology!

Leads

- Info About People
- Tracks Process
- Add Notes
- Record Of Changes

Opportunities

- Action Items
- Next Steps

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Terminology!

Leads

Everything Starts and Ends Inside Leads!
Different Lead Statuses Will Create Different Opportunities!

Status:

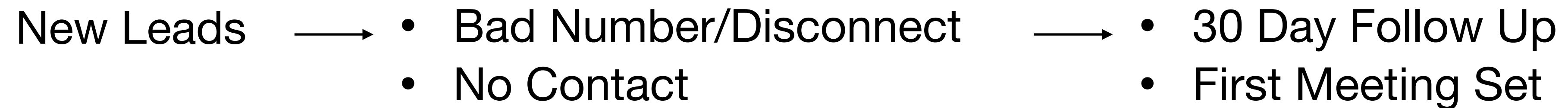
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New Lead → Import or Online
Bad Number/Disconnect → Bad Number/Disconnect
No Contact → Hasn't Responded To Outreach
30 Day Follow Up → 3-3-30 Follow Up Sequence
First Meeting Set → Appointment Setter sets Meeting
Meeting Set → Sales Sets Its Own First Appointment
Meeting Held → No Follow Up Meeting Set
Follow Up Meeting Set → Use this for all meetings after the first
Follow Up Meeting Held → No Follow Up Meeting Set
Docs Sent → Has Agreed To The Deal
Docs/Funding Pending/Stalled → Any issues with Docs or Funding
Funds Pending → They Have Said They Are Wiring
Funded → Funded

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The Lead Journey Through Status:

Appointment Setter



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The Lead Journey Through Status:

Sales

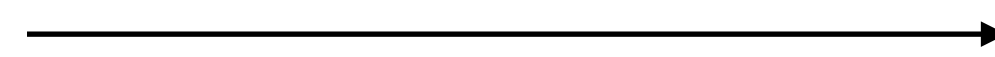
- First Meeting Set
- Meeting Set
- Meeting Held



- Docs Sent

OR

- Follow Up Meeting Set
- Follow Up Meeting Held



- 30 Day Follow UP

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The Lead Journey Through Status:

Sales

Docs Sent

