30 minute demo script for ConnectBeauty

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<u>**Legend**</u>
Regular paragraphs represent what to say
- *Italicized bulleted text represents what to do (click, highlight, etc…)*

This demo takes approx 30 minutes to complete, including the PPT. For a shorter presentation/demonstration, please refer to our 10 minute demo script available from the ConnectBeauty sales team.

Questions? Contact ConnectBeauty:
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Hi level demo flow outline

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<div style="margin-left: 4em;">

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</div>

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Detailed demoscript

1. PPT PRESENTATION

2. OWNER/ADMINISTRATOR

Let's begin by looking at ConnectBeauty from the perspective of the owner of the school and administrator of the system. In this role, you are mainly interested in tracking the performance of the school or company. With connectbeauty and the 'dashboard' you have real-time and immediate insight into different aspects of the business.

COMPANY PERFORMANCE

With the Company Performance tab you can get an Eagle-Eye view of different aspects of the schools performance. The information in the dashboard updates as people are working the systems, gaining more leads and closing deals. You can get real-time visibility into their activity and the results.

In the upper left quadrant, you see Total number of leads, prospects and accounts. You also see total open opportunities, and closed opportunities, and the associated dollar values of each.

With regard to leads and prospects, let's define them as used in ConnectBeauty. A lead is just that, a potential student who came through from the Internet or off of a purchased list. A prospect is someone who has shown deep interest in taking a tour and becoming a student or client. And an account is defined as someone who has signed a contract/deal and is considered a true customer and student.

In the Right quadrant you see the activity of your sales team. How many emails they've sent out, phone calls scheduled, and so on.

In the lower left you get a graphical view of Total Closed opportunities (deals) by product/service sold, and it is compared to the total sales goal for the month, so you can quickly see if your school is on track to reach your target.

In the lower right you see a pie chart broken out by total sales by manager, allowing you to see…of the total sales, who is doing what percentage of the work.

With this view you gain the detailed insight you need to know if your business is on track, and can either be rest assured things are going well, or immediately be informed if there is a situation that needs looking into further. This level of visibility allows you to make informed and timely decisions that can positively impact the business.

SALES FORECAST

- *Click on the Sales Forecast tab in the My Dashboard area*

Let's move on to the Sales Forecast tab. Here you get insight into what future sales are planned to be.

- *Point to Leads, Prospects and Account each in turn*

This view gives you, the owner, a view of what future sales are forecast to be. Not only do you get an idea of what your sales team is projecting their future sales will be, but you can see the total value, as compared to the weighted value (aligned with the probability of closing the deal). Based on current leads, prospects and accounts, this is what you can anticipate future sales to be, for a given time frame, allowing you to see forward and to plan you and your sales team's actions appropriately.

Something to point out is that each of these tabs offer different views based on the rights and roles of the person viewing it. As owner, I have a global view of the organization as a whole. If I were a sales manager, I would see only that revenue associated with deals that employees that report to me have forecast. And as an employee I would only see my potential sales forecast into the future. This view offers automated flexibility to display only what the person who is viewing it needs, allowing me to focus just on what I'm analyzing and saving me time accessing the right information.

CUSTOMER TRAFFIC

- *Click on the Customer Traffic tab in the Dashboard area*

As an owner, I spend a lot of money acquiring leads for my sales team. They are a vital part of the business, and I need to know how many are coming in, and at what stage they are in the sales process.

With the customer traffic tab I can see just that. At a glance I can see how many leads came in each day. What this answers for me is 'do I have a flow of leads coming in on a regular basis'. What is the pattern of leads coming in and do I need to change my approach to lead acquisition in order to make it a more steady stream?

- *Point to the 'Lead', 'Prospect' and 'Account' lines in sequence.*

As the owner I can come in, and in a matter of a few moments, glean a deep understanding of what is going on across the business. I can make informed decisions to follow up on potential issues (maybe a low amount of accounts based on quota), or give kudos to my sales team for being on target against their goals. This saves me time by avoiding waiting for someone to manually accumulate the data, automating the process into a real-time dashboard that gives me the insight, at a glance, of the things that matter to me.

- *Close the Dashboard by clicking the small 'x' to the right hand side of the Dashboard*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

3. SALES MANAGER

THEME CHOICE

In this demonstration we'll play the role of a sales manager, or someone who needs to monitor the activities of a sales territory and team.

We'll start out by quickly touching on theme setting, a unique aspect of connectbeauty.

- *Click on the Application Menu button in the upper left corner of connectbeauty.*
- *Choose Theme*

With theme setting connectbeauty allows you to set the color and design of the system to reflect your personality and tastes. This way you can make it a pleasing environment to work in, instead of being forced to look at a color scheme that may not be enjoyable to you.

- *Scroll down and choose Springtime*

Here we see that the color turns to a Spring green, with birds and flowers and more. People say they enjoy working in an application that has a theme that matches their style.

Let's move on to the Setup options.

GLOBAL SETUP

- *Click on the Global Setup tab on the ribbon/toolbar*

Depending on the role of the individual in the organization, as a sales manager you may be in charge of adding new employees to the system (typically representing salespeople who will be managing leads and closing deals).

Using an intuitive ribbon to organize sections you need to work in, we've grouped setup under Global Settings. Here, under Employee section, we add employees.

- *Click on 'Add Employee' in the Employee group*

It is very straightforward and intuitive, entering the demographic and geographic information about the employee. In the essence of time I'm going to quickly enter just some basic information.

- *Key in first name, last name*
- *Choose Department*

Department will assign what area of the company the employee is in.

- *Choose User Role*

A key aspect of employee addition is the user role as well as the boxes to the right.

Under 'role' we assign such things as employee, manager or admin or HR. These role names are customizable during system implementation to reflect the terminology in your business.

The role directly impacts what type of ribbon/functionality the person has access to. 'Employee' will give rights to see leads and associated activities, but not access to actually assigning leads, nor will they have access to global

settings. 'Manager' role will have access to assigning leads. 'Administrator' on will give them access to seeing the Global Settings.

Once I enter an employee I can save them and assign rights to them.

- *Click 'Save' on the right*
- *Click 'Rights' tab on the Add Employee page*

'Rights' refers to the territory your employees are assigned. This will directly affect what territory of leads/prospects/accounts and revenue they will see when doing both activities and reviewing their dashboard.

- *Close the Dashboard by clicking the small 'x' to the right hand side of the Dashboard*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

GOALS

- *Click on Goals in the Business Setup group on the ribbon/toolbar*

Next let's look at how simple it is to establish and share activity and revenue goals for the organization. This might be done by the owner, or the senior sales manager in your organization.

Goals refer to several aspects of targets that you wish your sales team to hit.

- *Point to the upper left section of the Goals tab*

Here we can establish how many phone calls and emails we expect the organization to make on a monthly basis. For example, we want each person to make 200 calls per month, and send out 250 emails. You expect their response time to leads to be 3 hour or less, and the lifespan of a lead to a deal to be 40 hours or less.

- *Point to the spreadsheet section in the lower half of the screen*

Down below is where you set your revenue goals.

You establish this by employee by month, which means you can get to an exact level of detail versus just one big number. Enter each employee's monthly revenue goal.

- *Click in January for Alicia Clark*
- *Key in 1000*

You can either key it in, or if it is based on some equation, you can easily tap it into the calculator. You can also copy and paste it in.

- *Click in February*
- *Click on the bullet in the cell*
- *Click on the calculator 70 X 60 =*

Once you've entered your values, click save in the upper left and ConnectBeauty will summarize all of the monthly goals into a companywide goal!

- *Click 'Save' in the upper left*
- *Click OK on the resulting window*

This means you can see the big picture and the detailed picture, allowing you to really understand what people are doing and how they are doing against target.

- *Close Goals page by clicking the small 'x' on the right side of the Goals tab.*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

LEAD GRABBER

- *Go to Leads tab on the master ribbon/toolbar*
- *Click on Lead Grabber in the Assign Lead group*

As a manager, once you've setup your employees and established the goals, you are ready to work on leads.

Let's start by talking about how you get leads into ConnectBeauty.

ConnectBeauty has a lead grabber feature that does a variety of things for you with regard to lead management. If you have a website with a lead form, connectbeauty automatically imports these leads real time. If you buy leads from another source, connectbeauty allows these leads to be imported as well.

You can use our form template on your website so that interested student's information automatically imports to the ConnectBeauty system. Or, using another form you already have in place, use the lead grabber feature to copy and paste the information into ConnectBeauty and not have to manipulate or rekey any of the information!

- *Click on the email you have stored in your email system*
- *Click inside of the email*

- *Right mouse click, choose Copy*
- *Click back in ConnectBeauty in the Lead Grabber area*
- *Place your cursor in the spreadsheet like area on the left*
- *Right mouse click, choose Paste*

This saves you a ton of time and energy, meaning you get your leads into the system for distribution and follow-up faster. You also increase the accuracy of the lead data, by avoiding keying errors.

- *Close Lead Grabber by clicking on the small 'x' on the right of the Lead Grabber tab*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

ASSIGN LEADS

- *Choose 'Assign Leads' from the 'Assign Leads' section on the ribbon/toolbar*

As we all know, leads are our bread and butter. They are an integral part to sales success. Without leads, there would be few, if any, sales. And, we all know that leads are not inexpensive to obtain. Therefore, we want it to be as easy as possible to manage these leads, get them assigned and begin turning them into closed sales as quickly as possible.

Leads are categorized into two types in ConnectBeauty. Internet Leads and Existing leads.

- *Click on Internet Leads tab*

Internet Leads are populated directly off of the Internet, populating the appropriate fields.

- *Click on Existing Leads tab*

Existing leads are those that were brought in with Lead Grabber, or imported from a spreadsheet of a purchased list. Assigning either type of lead is quick and accurate for a sales manager.

To assign a lead in ConnectBeauty, highlight the leads, check box the employee from the list on the right, save and those leads will now show up in that employee's leads list for immediate follow-up.

- *Highlight a group of leads in the list on the left by Left mouse clicking on the blue column to the left of the names, drag down as far as you wish, and let go*

- *Check mark an employee name in the right pane (i.e. Angie Nieland)*
- *Click Assign Lead button at the bottom of the right pane*

You can use the same process to reassign leads from unproductive or former sales reps. Connect Beauty saves you precious time in getting the lead into the process in a matter of minutes! Meaning leads get to your sales teams faster, so that they can start turning them into closed deals and revenue.

- *Close 'Assign Lead' page by clicking on the small 'x' on the right of the tab*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

TASKS

- *Click on Task button in the Schedule and Tasks group in the middle of the ribbon/toolbar*

Another helpful feature of ConnectBeauty is the ability as a sales manager to assign tasks to employees.

For example, if you happen to know that one of your employees is bad at keeping up on notes related to his/her activities; you can assign a task to have them 'update notes on all leads today'.

- *In the Subject field enter "update all notes"*
- *Choose end date*
- *Take drop down on 'Assign Task' and choose Alicia Clark*
- *Click Save*

- *Close 'Task' page by clicking on the small 'x' on the right of the tab*
- *Do NOT click the big 'X' to close the entire ConnectBeauty application.*

DASHBOARD

- *Click on My Dashboard in the Home group of the ribbon/toolbar*

Like the owner, I need to gain my own insight into different aspects of business activity and performance.   My Dashboard allows me to do just that. Let's look at a few of the other tabs that are more pertinent to me as a sales manager.

MY PIPELINE

- *Click on My Pipeline tab of the Dashboard area*

The Pipeline report gives you insight into the associated dollar amount of the pipelines of all those employees who report to me. It summarizes it by Lead and Prospect.

- *Point to the 'My Lead Pipeline' and the 'My Prospect Pipeline' areas on*

And within each of those two categories, it further refines it based on the way you want to define the status of the lead. The 'groups' as we call them in connectbeauty, qualify at the temperature of lead is with regard to moving forward with becoming a student. For example, "Now (Hot)", "Not Today (Cold)", "Maybe (Warm)" and "Nurture (Future)". From which you can glean, how quickly this might turn into real revenue.

MY GOALS

- *Click on 'My Goals' tab of the Dashboard area*

Under My Goals, you can see the sales activity and revenue attainment of all of those employees in the territory that report to you.

- *Point to the 'My Assigned Tasks' in the upper left of the 'My Goals' tab*

My assigned task area summarizes the overall activity goals of employees such as phone calls and emails and overall revenue goal.

- *Point to the 'My Achieved Tasks' in the upper right of the 'My Goals' tab*

My achieved tasks reports exactly what has been done by your employees.

- *Point to the 'My Sales Goal' thermometer in the lower left of the 'My Goals' tab*

Down below on the Thermometer you can see the revenue attainment of your employees, based on their goal.

- *Point to the 'My Company's Sales Goal' thermometer in the lower right*

And you can compare it to the overall goal of the company and attainment companywide; all at a glance.

This means that without having to have all of your employees create special reports, and then manually consolidating it yourself, you can, at a glance, see how you are doing compared to goal!

CHARTS

- *Click on Charts tab of the Dashboard area*

There are several more levels of information that you can review, but in the essence of time, let's talk about just one more.

The Charts tab allows you to focus in on your top 10 employees, and see what they are doing with regard to revenue pipeline, by lead, prospect and by account (actual student customers).

- *Point to the upper bar chart area on Charts tab*

And down below I can see in a pie chart, who is contributing what amount of the revenue to the entire goal.

- *Point to the lower pie chart area on Charts tab*

This pie chart allows you to see the source of the revenue is (where it's coming from). Each source is generating not just lead, but revenue in ultimately closed deals. This reflects the real money coming in through sources. If few opportunities are coming through a source you know is expensive, you might change your approach to using that source for leads in the future, and focus more on sources that are turning into deals.

- *Close the Dashboard by clicking on the small 'x' on the right.*
- *Do NOT click the red 'x' to close the entire ConnectBeauty application.*

CALENDAR

- *Click on Calendar in the Schedule and Task section of the ribbon/toolbar*

While we know that everyone uses some sort of email/scheduling application such as Outlook or Lotus Notes, these aren't automatically synchronized with the sales process. This is essential for the sales person who is scheduling a tour or call with a specific lead or prospect.

- *Click on 'Schedule Meetings' in the left pane*
- *Take the 'Label as' drop down*
- *Point to the different options*
- *Close the 'Schedule Meetings' window without saving anything*

Connecting the schedule with a lead enables you, in the sales process, to have insight into all activities and associated leads in one place. In ConnectBeauty, you can synch our calendar back with Outlook, if you still want a global view of all your activities, sales related or not.

- *Close the 'My Calendar' page by clicking on the small 'x' on the right.*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

For the sales manager, you have control over several aspects of the setup and performance review process. Allowing you to save time in processes such as assigning leads, and giving you the insight into your sales team's activity and revenue attainment to know if you need to take action to improve performance, or celebrate the attainment of goals! ConnectBeauty makes you more productive and informed, leading to better decision making for positive impact on the business.

4. SALESPERSON

THEME CHOICE

In this demonstration we'll play the role of the salesperson who is responsible for turning leads into true customers and students of our beauty school.

First we'll start out by quickly touching on theme setting, a unique aspect of connectbeauty.

- *Click on the Application Menu button in the upper left corner of connectbeauty.*
- *Choose Theme*
- *Scroll down and choose Valentine*
- *Note the changes to hearts on the screen*

With theme setting connectbeauty allows you to set the color and design of the system to reflect your personality and tastes. This way you can make it a pleasing environment to work in.

VIEW LEADS

As a sales person, your world revolves around the sales process, from lead to close, this is your life. And the source of all sales, are potential sales which start out as leads. You love leads, lots of leads. And with ConnectBeauty, you can easily work your way from lead to close in an intuitive workflow. Let's begin.

- *Click on the 'View Leads' option in the 'Lead's tab of the ribbon/toolbar*

First you'll want to review your leads. And you only want to see YOUR leads, not have to mill through a list and filter out your own. With ConnectBeauty, based on the leads your manager assigned you, your view will be only that of YOUR leads.

Next you'll need to take action on these leads, and you'll want to schedule your time accordingly. Once you initially make contact, you probably will want to do a follow up with some for more refined qualification or sale. On the right pane of the View Leads section you can perform several of the most common activities in a matter of mouse clicks.

- *Click on any lead in the list*
- *Click on 'Call' in the Schedule box of the right pane*

Simply click on the lead in question, and schedule a call. Just like the Outlook that you are familiar with, fill in the fields and your calendar is updated, with this leads activities.

- *Close the 'Call' window without saving anything*
- *Click on 'Meeting' in the 'Schedule' box of the right pane*

If you need to schedule a meeting the same applies.

- *Click on 'Label as' and point out 'meeting', 'tour', etc...*

If you are scheduling a tour for a lead, then you'll want to label it appropriately; which is easy with ConnectBeauty and our drop down options. Assign a tour, add details and save.

- *Close the 'Meeting' window without saving anything*
- *Click on 'Write Email' in the 'Schedule' box of the right pane*

Another frequent activity is writing an email to a lead. Using our in system marketing templates, you can launch an email, choose from any of your leads names, choose from email templates you and your colleagues have created and saved in the ConnectBeauty system and send it on its way.

- *Click the 'Choose template' dropdown on the right*
- *Choose a template and see it appear in the body of the email*

No more wasting time writing an email from scratch, cutting and pasting email from one system to another. It is all connected in ConnectBeauty, helping to make you to work more efficiently and get on to closing more of those deals!

- *Close the 'Write Email' window without saving anything*

Once the lead is interested enough to not be considered 'cold' anymore, you can promote them to a Prospect, right from this same screen.

- *Click the 'Promote to Prospect' button in the upper portion of the right pane*
- *Click 'yes' on the question window*
- *Click 'OK' on the confirmation window*

All of the associated information and activity done with the lead follows it along to prospect. None of your work or detail disappears.

- *Close the View Leads section by clicking on the small 'x' on the right of the My Customers tab*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

CONTACTS

- *Click on the Contacts option in the Leads tab of the ribbon/toolbar*

A unique feature of ConnectBeauty is that of contacts. Other beauty schools told us that sometimes there are contacts, that aren't related to leads or prospects that you need to communicate with on a regular basis. Your IT Helpdesk for example, your colleague, etc… Now these are obviously in Outlook, but if you are working in ConnectBeauty, we don't make you jump out of one solution and into another. You can add these important people to ConnectBeauty, and communicate with them where you spend a majority of your day. Saving you time and once again, helping you to be more productive.

- *Close the 'Contacts' window by clicking on the small 'x' on the right*
Do NOT click the big 'X' that closes the entire ConnectBeauty application.

OPPORTUNITY

- *Click on the Prospects tab of the master ribbon/toolbar*
- *Click on the 'View Prospects' option in the Prospects group*

Moving on, as a sales person you are most concerned with having leads or prospects show interest in your product/service, or in this case, school. Once a

lead or prospect shows interest in a certain service, there is a dollar value associated with that potential sale. It is at this point, with ConnectBeauty, that we assign an 'opportunity'. Think of an opportunity as having 'financial value'.

- *Click on the lead you promoted to prospect.*

Let's follow that lead that became a prospect. Here it is.

Clicking on that prospect, you'll get the same shortcut menu on the right that we did with the lead. This time however, you can associate a financial opportunity with the prospect.

- *Click 'Create Opportunity' in the right pane.*

By clicking on Create Opportunity, you assign a dollar value to a lead or prospect or account and enter the details.

- *Choose anticipated close date*
- *Choose a Product/Service by taking the drop down and clicking one.*
- *Choose a quantity*

Details include such things as when you anticipate the deal will close, what product/service you are selling, how many and the probability of close. The rate will automatically fill in based on setup you do under Global Setup of your products/services, but you can manually override this if you wish.

- *Choose a probability (i.e. 80%)*

Then assigning the probability will create a weighted value of what you anticipate future revenue to be, based on "closing probability".

- *Close the Create Opportunity window by clicking on the small 'x' on the right*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

NOTE AND HISTORY

Once you are making progress with a prospect (or lead or account), you want to keep track of things you say and do. The notes section of ConnectBeauty allows you to do just that.

- *Double click on the Prospect you are working on, to open the Prospect details.*

Open the Prospect, click on Note, and enter the details, such as 'talked to Janice. She wants a follow up call in 1 week'.

You add the note, schedule the call and now we have all the details in one place (instead of on sticky notes, in Outlook, and other places).

- *Click on the History tab of the open Prospect section.*

History of all of your actions, too, is kept here associated with the prospect, tracking details of activity and other pertinent data. The information is where you need it to be most productive with the sales process.

- *Close the History window by clicking on the small 'x' on the right*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

PROMOTE TO ACCOUNT

- *Click on the Promote to Account button in the right pane of the Prospect page*

As a salesperson, success is when a prospect signs a contract and becomes your customer. To track that easily in ConnectBeauty, you simply click 'promote to account'. The system performs a number of steps to keep information accurate for analysis and reporting.

The prospect is now categorized as an 'account' and a true customer or student. The dollar value of the sale is reported as 'earned revenue' on all dashboards and reports, and falls off of future forecasts, since it is essentially 'won'.

- *Close the 'My Customers – Prospect' window by clicking on the small 'x' on the right*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

DASHBOARD

- *Click on the My Dashboard in the ribbon/toolbar*

As a salesperson, you too are interested in performance. YOUR performance. You can review your dashboard to get information on different aspects therein.

MY PIPELINE

- *Click on My Pipeline tab of the Dashboard area*

The Pipeline report gives you insight into the associated dollar amount of all of your deals. It summarizes it by Lead and Prospect.

- *Point to the 'My Lead Pipeline' and the 'My Prospect Pipeline' areas on*

And within each of those two categories, it further refines it based on the way you want to define the status of the lead. The 'groups' as we call them in connectbeauty, qualify at the temperature of lead is with regard to moving forward with becoming a student. For example, "Now (Hot)", "Not Today (Cold)", "Maybe (Warm)" and "Nurture (Future)". From which you can glean, how quickly this might turn into real revenue.

MY GOALS

- *Click on 'My Goals' tab of the Dashboard area*

Under My Goals, you can see all of YOUR sales activity and revenue attainment.

- *Point to the 'My Assigned Tasks' in the upper left of the 'My Goals' tab*

My assigned task area summarizes your activity goals such as phone calls and emails and overall revenue goal.

- *Point to the 'My Achieved Tasks' in the upper right of the 'My Goals' tab*

My achieved tasks reports exactly what you have done.

- *Point to the 'My Sales Goal' thermometer in the lower left of the 'My Goals' tab*

Down below on the Thermometer you can see actual revenue attainment, based on YOUR goal.

- *Point to the 'My Company's Sales Goal' thermometer in the lower right*

And you can compare it to the overall goal of the company and attainment companywide.

This means that without having to spend hours creating different spreadsheets to calculate all of this different data, you can, at a glance, see how you are doing compared to goals!

- *Close the 'Dashboard' window by clicking on the small 'x' on the right*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

REPORTS

- *Click on the Reports section of the Leads or Prospect section of the ribbon/toolbar*

In addition to my dashboard, you, and everyone in the company with rights to use connectbeauty, may run any number of detailed reports.

- *Point to the different report groupings in the left pane*

These reports are broken out by key data that I need on a regular basis, grouped by Business Essential reports, Leads, Prospects, Accounts, Calendar and Employee. Click on the report, and it generates and can be output to any number of formats for saving or printing.

- *Close the 'Reports' window by clicking on the small 'x' on the right*
- *Do NOT click the big 'X' that closes the entire ConnectBeauty application.*

5. DEMO WRAPUP

What we've seen is how ConnectBeauty thoroughly supports the lead management and sales cycle. It enables everyone involved in the process, from owner to sales manager to salesperson, to focus on what is essential to you. In one system you can import leads, schedule tours, track notes and calendar appointments, add financial opportunities, promote to prospect and eventually account and track the activity and performance of everyone in the company, real-time on personalized dashboards.

With ConnectBeauty you are able to control the lead management and sales cycle with an easy to use solution that helps you to be more productive, offer deep insight into the details and performance, and ultimately drive more revenue and success for your business.

6. PPT PRESENTATION

Questions?
Contact ConnectBeauty
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