



improve it 360

an EverCommerce Solution

Best Practices for

Data Collection

Agenda

Keep a clean Source list – End your old Sources, no Duplicate Names

The importance of tracking Marketing Costs – ROI Reporting

Use only Supported Result Values – the consequence of changing Result values

Appointment Resulting – Result ALL Appointments for accurate Close %

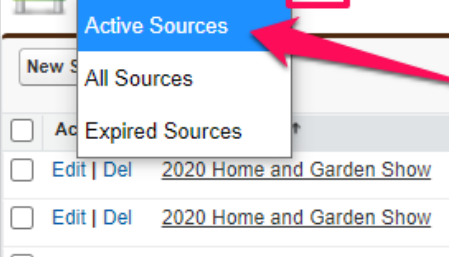
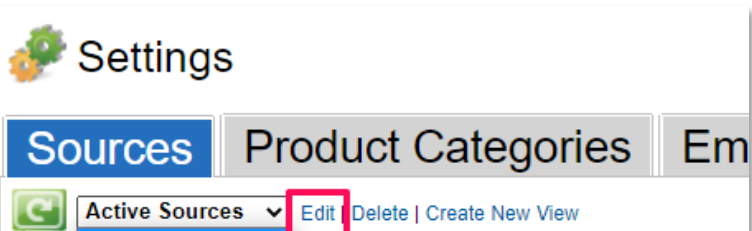
Report “count” metrics – what is “Issued” “Demoed” and “Net”

Disregard in Statistics – do you have a true 2-step close process?

Final all Sales to ensure a Marketing Opportunity opens for the future

Keep your Source list clean

Prevent your Lead Entry team from attributing leads to the wrong Sources



No Duplicate Names!

Action	Source Name ↑	Owner Active	Type	Start	End	Total Cost	Created Date
<input type="checkbox"/> Edit Del	104.2FM	✓	Radio	2/19/2019		\$2,100.00	2/19/2019
<input type="checkbox"/> Edit Del	2020 Home and Garden Show	✓	Show or Event	1/1/2020		\$1,200.00	5/11/2020
<input type="checkbox"/> Edit Del	2020 Ohio State Fair	✓	Show or Event	1/1/1995		\$11,000.00	
<input type="checkbox"/> Edit Del	2020 Spring Postcard	✓	Direct Mail	1/1/2020		\$27,000.00	
<input type="checkbox"/> Edit Del	2020 Spring Postcard	✓	Direct Mail	1/1/2020		\$0.00	7/15/2020

Change the Source Name (even if it has an End date) to prevent eLeads from being attributed to the wrong Source.

Enter your Marketing Costs

	SOURCES WITH LEAD SOURCES WITH W/O APPTS, SALES Sources with Lead Sources with w block 1										SOURCES WITH SOURCE COSTS Sources with Source Costs block 2				
	Lead Sources	Set	Canceled	Issue	Demo	Sold	Sold Price	Net	Net Amt	AVG Net Amount	Amount	Cost per Lead	Cost per Demo	Cost per Issue	ROI
Source Name: 104.2FM	7	5	0	4	3	3	\$16,145.00	2	\$11,645.00	\$5,822.50	\$6,500.00	\$928.57	\$2,166.67	\$1,625.00	148.38%
Source Name: Cincinnati Call Center	1	0	0	0	0	0	\$0.00	0	\$0.00	\$0.00	\$21,532.00	\$21,532.00	\$0.00	\$0.00	-100.00%
Source Name: Columbus Call Center	1	1	0	1	1	1	\$1,000.00	1	\$1,000.00	\$1,000.00	\$12,584.00	\$12,584.00	\$12,584.00	\$12,584.00	-92.05%
Source Name: Company Web Site	3	3	0	3	3	3	\$11,800.00	2	\$11,000.00	\$5,500.00	\$785.00	\$261.67	\$261.67	\$261.67	1,403.18%
Source Name: HomeAdvisor	1	0	0	0	0	0	\$0.00	0	\$0.00	\$0.00	\$4,815.00	\$4,815.00	\$0.00	\$0.00	-100.00%
Source Name: Home Depot #457	2	0	0	0	0	0	\$0.00	0	\$0.00	\$0.00	\$2,000.00	\$1,000.00	\$0.00	\$0.00	-100.00%

Calculate Cost per Lead, Cost per Demo and Return on Investment

Source **104.2FM**

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Source Costs [5] | [Lead Sources \[5+\]](#) | [Marketing Opportunities \[5+\]](#) | [Appointments \[4\]](#) | [Source History \[0\]](#) | [Notes & Attachments \[0\]](#)

Source Costs
New Source Cost
Source Costs Help ?


Action	Source Cost ID	Paid On	Description	Amount
Edit Del	SRC024	1/26/2023		\$2,200.00
Edit Del	SRC023	1/26/2022		\$2,200.00
Edit Del	SRC022	1/26/2021		\$2,100.00
Edit Del	SRC021	1/26/2020		\$2,000.00
Edit Del	SRC017	12/1/2019		\$2,100.00

At minimum enter your Annual costs!

Appointment Result Values cannot be Edited

Appointment Custom Field Result (Managed)

[Back to Appointment](#)

 This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Validation Rules](#) [0]

Custom Field Definition Detail

[Edit](#)

[Set Field-Level Security](#)

[View Field Accessibility](#)

[Where is this used?](#)

Field Information

Field Label	Result	Object Name	Appointment
Field Name	Result	Data Type	Picklist
Namespace Prefix	i360		
API Name	i360_Result_c		
Description	***DO NOT MODIFY THE PICKLIST VALUES OF THIS FIELD*** It will break the way reports function and void your service agreement with ImproveIt!360.		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

No Custom Result Values are supported

RESULT VALUES

Sold

Demoed, Not Sold

Follow-up

Not Demoed

One Leg

No Show

Not Run

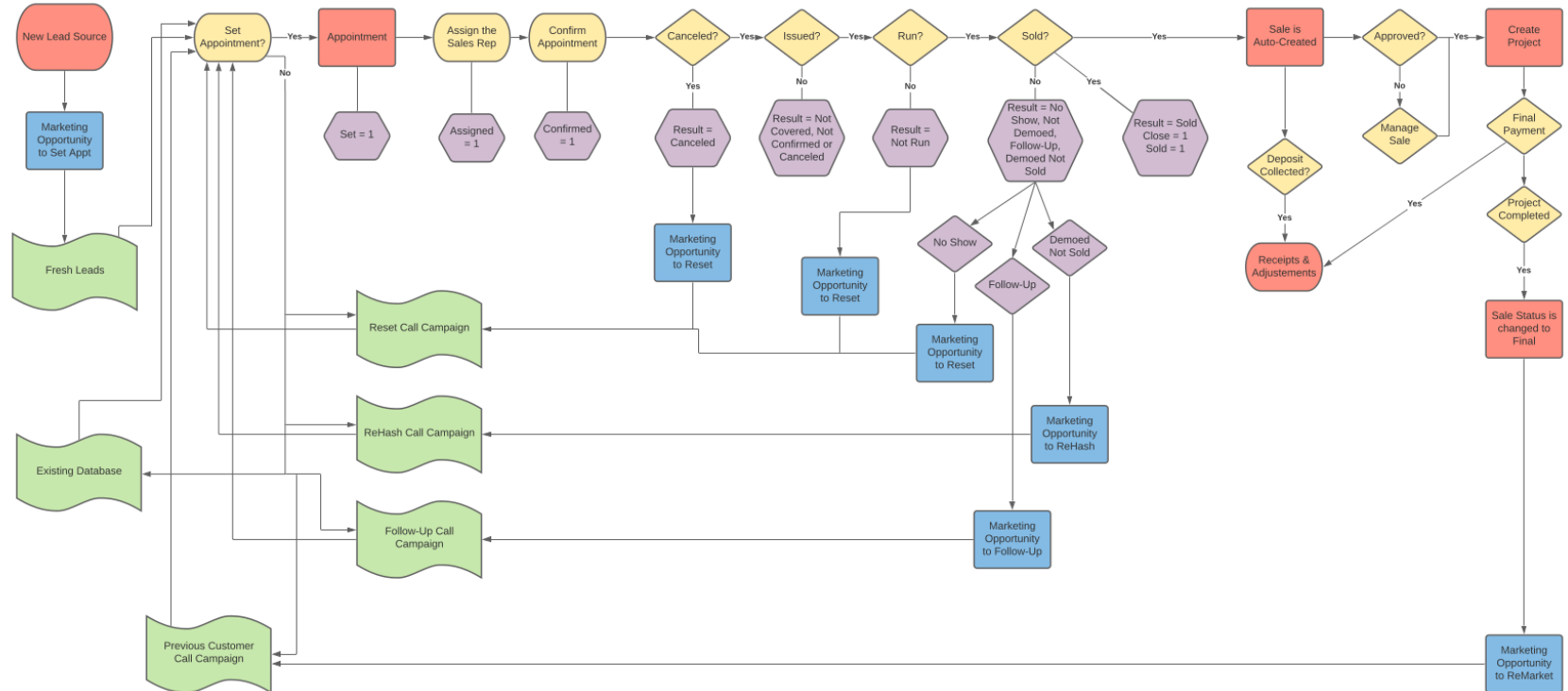
Not Covered

Not Confirmed

Canceled

Appointment Resulting Flow

Using unsupported Results = No Marketing Opportunity



Appointment Results and Count metrics

RESULT VALUE DEFINITIONS

Sold	The prospect bought your product and/or signed a contract. This will create a Sale in the system.
Demoed, Not Sold	The sales pitch was completed (a quote was left with the prospect) but the deal was not closed (no signed contract).
Follow-up	The product was demoed (or partially demoed) but a follow-up action is needed to close the deal, such as a new price quote or a modified design.
Not Demoed	The product demo was not given. This could be due to the prospect not being properly qualified, the appointment being interrupted, etc.
One Leg	Only one decision maker was present during the appointment and both are required.
No Show	The prospect was not present for the demonstration.
Not Run	The sales rep did not make it to the appointment.
Not Covered	The appointment was not run due to an issue with your company. For example, the sales rep got caught in traffic and could not make the appointment, or he/she was double-booked.
Not Confirmed	The appointment was not confirmed by your company and therefore was not run. This is contingent on your company's specific confirmation practices.
Canceled	The appointment was requested to be canceled by the prospect.

Issue = all *supported* results except: Not Covered, Not Confirmed, Canceled

Demo = Sold, Demoed Not Sold, Follow-up

Net = the Sale has a Net On date and is not Canceled

	Set	Issue	Demo	Sold	Sold Price	Working	Working Amt	Net	Net Amt	Canceled	Canceled Amt	Sold %	Net %	Avg Sold Amt	NSP	NSLI
<input type="checkbox"/> Sales Rep 1: Staff Name: Bertram Sales Rep (3 records)	3	2	2	2	\$4,800.00	1	\$4,300.00	1	\$500.00	0	\$0.00	67%	50%	\$250.00	50.00%	\$250.00
<input type="checkbox"/> Sales Rep 1: Staff Name: Billy Sales Rep (11 records)	10	8	8	7	\$33,240.05	0	\$0.00	8	\$33,240.05	0	\$0.00	88%	114%	\$4,748.58	100.00%	\$4,155.01
<input type="checkbox"/> Sales Rep 1: Staff Name: Bobby Sales Rep (7 records)	7	6	6	3	\$18,540.00	1	\$9,540.00	2	\$9,000.00	0	\$0.00	43%	67%	\$3,000.00	33.33%	\$1,500.00
<input type="checkbox"/> Sales Rep 1: Staff Name: Olivia Admin (3 records)	3	3	3	3	\$9,813.00	2	\$8,113.00	1	\$1,700.00	0	\$0.00	100%	33%	\$566.67	33.33%	\$566.67
<input type="checkbox"/> Sales Rep 1: Staff Name: Olivia Owner (2 records)	2	0	0	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0%	0%	\$0.00	0.00%	\$0.00
<input type="checkbox"/> Sales Rep 1: Staff Name: Sammy Sales (27 records)	26	24	24	20	\$117,655.82	1	\$3,600.00	19	\$104,055.82	1	\$10,000.00	80%	95%	\$5,202.79	79.17%	\$4,335.66
<input type="checkbox"/> Sales Rep 1: Staff Name: Stephen Sales (2 records)	2	1	1	1	\$2,000.00	0	\$0.00	1	\$2,000.00	0	\$0.00	50%	100%	\$2,000.00	100.00%	\$2,000.00
<input type="checkbox"/> Sales Rep 1: Staff Name: Steve Service (3 records)	3	2	2	1	\$2,855.00	0	\$0.00	1	\$2,855.00	0	\$0.00	33%	100%	\$2,855.00	50.00%	\$1,427.50
Grand Totals (58 records)	56	46	46	37	\$188,903.87	5	\$25,553.00	33	\$153,350.87	1	\$10,000.00	73%	89%	\$4,144.62	71.74%	\$3,333.71

Deactivate Appointment Result Values you do not use

Values

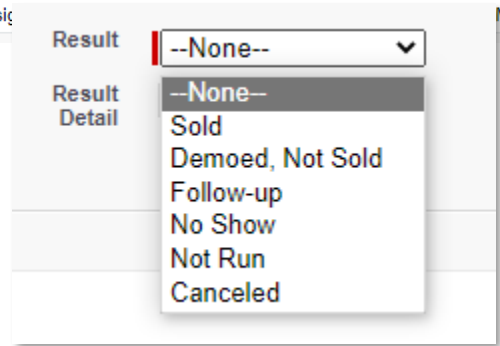
New Reorder Replace Printable View Chart Colors

Delete Selected Deactivate Selected Replace Selected Beta!

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Sold	Sold	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	Demoed, Not Sold	Demoed, Not Sold	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	Follow-up	Follow-up	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	No Show	No Show	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	Not Run	Not Run	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	Not Confirmed	Not Confirmed	<input type="checkbox"/>	Assigned dynamically	Olivia Admin , 2/19/2019 4:47 PM
Edit Del Deactivate	Canceled	Canceled	<input type="checkbox"/>	Assig	

REDUCE RESULTS
Sold
Demoed, Not Sold
No Show
Not Run
Canceled

Click 'Deactivate' next to the Value



Reduce confusion for your Sales team!

Use 'Result Details' to tell the full story

<u>Sold</u>	<u>Demoed, Not Sold</u>	<u>Follow-up</u>	<u>No Show</u>	<u>Not Run</u>	<u>Canceled</u>
<i>Procrastination</i>	Procrastination	<i>Procrastination</i>	<i>Procrastination</i>	<i>Procrastination</i>	<i>Procrastination</i>
<i>Price Objection</i>	Price Objection	<i>Price Objection</i>	<i>Price Objection</i>	<i>Price Objection</i>	<i>Price Objection</i>
<i>Overbooked</i>	<i>Overbooked</i>	<i>Overbooked</i>	<i>Overbooked</i>	<i>Overbooked</i>	<i>Overbooked</i>
<i>Other Estimates</i>	Other Estimates	<i>Other Estimates</i>	<i>Other Estimates</i>	<i>Other Estimates</i>	<i>Other Estimates</i>
<i>Not Interested</i>	Not Interested	<i>Not Interested</i>	<i>Not Interested</i>	<i>Not Interested</i>	Not Interested
<i>No Price Given</i>	<i>No Price Given</i>	<i>No Price Given</i>	<i>No Price Given</i>	<i>No Price Given</i>	<i>No Price Given</i>
<i>Marketing Issue</i>	<i>Marketing Issue</i>	<i>Marketing Issue</i>	<i>Marketing Issue</i>	<i>Marketing Issue</i>	Marketing Issue
<i>Credit Not Qualified</i>	Credit Not Qualified	<i>Credit Not Qualified</i>	<i>Credit Not Qualified</i>	<i>Credit Not Qualified</i>	Credit Not Qualified
<i>Cannot Afford</i>	Cannot Afford	<i>Cannot Afford</i>	<i>Cannot Afford</i>	<i>Cannot Afford</i>	<i>Cannot Afford</i>
<i>Bad Time</i>	<i>Bad Time</i>	<i>Bad Time</i>			Bad Time
<i>3rd Party Influence</i>	3rd Party Influence	<i>3rd Party Influence</i>			<i>3rd Party Influence</i>
<i>Design</i>	<i>Design</i>	Design			<i>Design</i>
<i>Negotiation/Review</i>	<i>Negotiation/Review</i>	Negotiation/Review			<i>Negotiation/Review</i>
Partial Sale	<i>Partial Sale</i>	<i>Partial Sale</i>			<i>Partial Sale</i>
<i>One Leg</i>	One Leg	<i>One Leg</i>			<i>One Leg</i>

Result

Result Detail

--None--

Procrastination

Price Objection

Other Estimates

Not Interested

Credit Not Qualified

Cannot Afford

3rd Party Influence

One Leg

**CUSTOM VALUES
SUPPORTED!**

Examples

- Consolidate One Leg under Demoed, Not Sold
- Consolidate No Show under Canceled

Appointment count fields require Resulting

No Result = No Report metrics

Issue = Sold, Demoed Not Sold, Follow-up, Not Demoed, One Leg, No Show and Not Run

Custom Summary Formula Help for this Page

Column Name: ⓘ

Description:

Format: Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels
 Grand summary only
 Grouping 1: Sales Rep 1: Staff Name

Formula

Summary Fields Operators Functions

ABS(number)
Returns the absolute value of a number, a number without its sign

Close % = Sold / Issue

If your Close % is based on Issue, Resulting every Appointment is critical.

Appointment Name	Sale Name	Result	Set	Issue	Demo	Sold	Sold Price	Working	Working Amt	Net	Net Amt
Sales Rep 1: Staff Name: <u>Bobby Sales Rep</u> (7 records)											
<u>Test Luna Roofing</u>	<u>Roofing : Test Luna</u>	Sold	1	1	1	1	\$9,000.00	0	\$0.00	1	\$9,000.00
<u>Frank Nicholas Windows</u>	<u>Windows : Frank Nicholas</u>	Sold	1	1	1	1	\$0.00	0	\$0.00	1	\$0.00
<u>Affronti Bess Bathrooms</u>	<u>Windows : Affronti Bess</u>	Sold	1	1	1	1	\$9,540.00	1	\$9,540.00	0	\$0.00
<u>Albery Mariana Flooring</u>		Demoed, Not Sold	1	1	1	0	-	-	-	-	-
<u>Abdo Janette Doors</u>		Demoed, Not Sold	1	1	1	0	-	-	-	-	-
<u>Ackers Emilie Doors</u>		Demoed, Not Sold	1	1	1	0	-	-	-	-	-
<u>Apartments Acorn Windows</u>		-	1	0	0	0	-	-	-	-	-
Sales Rep 1: Staff Name: <u>Stephen Sales</u> (2 records)											
<u>Test Angie Flooring</u>	<u>Flooring : Test Angie</u>	Sold	2	1	1	1	\$2,000.00	0	\$0.00	1	\$2,000.00
<u>Test Larry Bathrooms Doors</u>		-	1	0	0	0	-	-	-	-	-
Sales Rep 1: Staff Name: <u>Steve Service</u> (3 records)											
<u>Test Alison Windows</u>	<u>Windows : Test Alison</u>	Sold	3	2	2	1	\$2,855.00	0	\$0.00	1	\$2,855.00
<u>Show Distance Windows</u>		-	1	0	0	0	-	-	-	-	-
<u>Test alexander Service</u>		Demoed, Not Sold	1	1	1	0	-	-	-	-	-
Grand Totals (12 records)			12	9	9	5	\$23,395.00	1	\$9,540.00	4	\$13,855.00

Disregard in Statistics – the correct use

Disregard = No Report metrics

Appointment Name	Appointment Date	Type	Set	Canceled	Follow-up	Issue	Demo	Sold	Disregard in Statistics	Result
Sales Rep 1: Staff Name: <u>Sammy Sales</u> (30 records)			28	0	0	23	23	23	5	
<u>Winthrop, Sarah Windows</u>	7/13/2020	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up
<u>Winthrop, Sarah Windows</u>	7/13/2020	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up
<u>Smith, Pearl Windows</u>	5/12/2020	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up

Follow-up Result = True 2-step Close process

Your Rep is unable to give the Prospect a price, and the Prospect does not have an opportunity to decline a proposal on their first Appointment.

See also: [Understanding Disregard in Statistics](#)



1. Sales Rep ran the Appointment and gave a Demo



2. Sales Rep leaves and creates a Proposal in order to present the Prospect with a price.



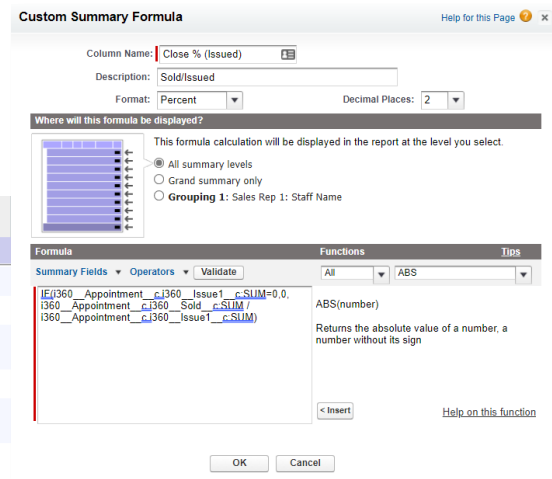
3. Sales Rep returns for a second Appointment with a complete Quote, ready to close the deal!

Disregard in Statistics

Be cautious, do not over-use

Appointment Name	Type	Set	Canceled	Follow-up	Issue	Demo	Sold	Disregard in Statistics	Result	Sold Price	Sale Name ↑
Sales Rep 1: Staff Name: <u>Sammy Sales</u> (36 records)											
<u>Test, Franklin Doors</u>	New	1	0	0	1	1	1	<input type="checkbox"/>	Sold	\$1,000.00	Doors : Test, Franklin
<u>Test, Gary Doors</u>	New	1	0	0	1	1	1	<input type="checkbox"/>	Sold	\$1,000.00	Doors : Test, Gary
<u>Addiego, Benedict Flooring</u>	New	1	0	0	1	1	1	<input type="checkbox"/>	Sold	\$3,900.00	Flooring : Addiego, Benedict
<u>Davis, David Flooring</u>	Follow-up	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Sold	\$9,000.00	Flooring : Davis, David
<u>Test, Virginia Windows</u>	New	1	0	0	1	1	1	<input type="checkbox"/>	Sold	\$4,265.82	Flooring : Test, Virginia
<u>Jenkins, Mitchell Siding</u>	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Sold	\$7,400.00	Siding : Jenkins, Mitchell
<u>Johnson, Eric Siding</u>	New	1	0	0	1	1	1	<input type="checkbox"/>	Sold	\$5,650.00	Siding : Johnson, Eric

Appointment Name	Type	Set	Canceled	Follow-up	Issue	Demo	Sold	Disregard in Statistics	Result	Sold Price
<input type="checkbox"/> Sales Rep 1: Staff Name: <u>Sammy Sales</u> (34 records)										
		32	0	0	22	22	22		10	\$128,161.82
<u>Winthrop, Sarah Windows</u>	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up	-
<u>Winthrop, Sarah Windows</u>	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up	-
<u>Blaze, Jack Roofing</u>	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Canceled	-
<u>Ackers, Emilie Doors</u>	Rehash	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Canceled	-
<u>Smith, Pearl Windows</u>	New	1	0	0	0	0	0	<input checked="" type="checkbox"/>	Follow-up	-




Close % = Sold / Issue



Be sure not to Disregard any Results other than Follow-up



See also: [One Click Contractor considerations](#)

Why wouldn't a Prospect ever come into the Queue?

▼ Closed-Loop Marketing [What is a Marketing Opportunity?](#)

 There are [640 Marketing Opportunities](#) ready to work 

 There are [7 past Appointments](#) that have no result 

 There are [44 Sales over 180 days old](#) that are not yet Final 

To ensure you are calling the customer again:

- ✓ **Result all Past Appointments**
- ✓ **Give Sales a Final On date when the job is finished**

Prospects without an open Marketing Opportunity will not be pulled into the Call Queue

- **Prospect has been Flagged, or given a Not Qualified Reason**
- **Prospect has an open Appointment**
- **Prospect has an open Sale**

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

