



Prospect Management Relationship (PRM)



System7

HELP



How does PRM work

- My dashboard Explained
 - Edit – Delete – Print
 - History
 - Organize follow ups and daily tasks
 - Search - Print – Export - +New Entry
- Adding prospects AUTOMATICALLY
- What is the difference between Send and Share?
- Adding Prospects MANUALLY

OTG is fully committed to meeting **GDPR (General Data Protection Regulation)** requirements, safeguarding data subject rights and ensuring accountability at all levels.

OTG takes security and privacy seriously both in our services and our organization to protect the data our customers entrust to us.



CONTACT



INVITE



PRESENT



FOLLOW UP

My Dashboard explained



My PRM Dashboard

Welcome **SUSANA DI BROWSKI**
You 😊

EMAIL INVITATION

SHARE INVITATION

TUTORIALS & HELP

Search table

SEARCH by any word on every column

pdf

PRINT

EXPORT

NEW ENTRY

Excel

Click on any column title to ORDER AZ or ZA

ADD prospect manually

Name	Invitation Sent	Email	Social Media	Rating	Focus	Registration	Intro Viewed	Video BB Viewed	Video BB II Viewed	Comments	To do next	Next step date
John Smith	28 Oct 2020 09:41 AM	John@Smith.com		4. Very interested	Not Clear Yet, Customer	27 Oct 2020 12:31 PM	27 Oct 2020 12:30 PM	28 Oct 2020 09:44 AM	27 Oct 2020 12:32 PM	great call	Zoom	21 Oct 2020
Lisa Jones	15 Oct 2020 01:34 PM	Lisa@Jones.com		1. Not Interested	Social Selling, Pharamanex	14 Oct 2020 09:25 AM		14 Oct 2020 09:25 AM	28 Sep 2020 11:43 AM	friend of Lucas	Zoom	05 Oct 2020
Peter Gomez		Peter@Gomez.es				08 Oct 2020 05:34 PM		24 Sep 2020 08:01 PM	24 Sep 2020 08:15 PM			
Susana Test	01 Oct 2020 10:28 AM	susana@otg.global								this is a test	call	
	10 09:02	Gustav@Kerr.se				12 Oct 2020 09:08 AM		12 Oct 2020 09:09 AM		Richard's cousin	call	05 Nov 2020
Susan Miller	28 Sep 2020 04:26 PM	Susan@Miller.no		4. Very interested		12 Oct 2020 11:18 AM		12 Oct 2020 11:19 AM		super interesting	call	14 Oct 2020

Edit (update your prospect info)

Selected row will change color

Susana Test 01 Oct 2020 10:28 AM susana@otg.global

Click on the row to **SELECT** the Prospect

Edit - Delete - History



You can choose more than one **FOCUS** line

FOCUS

Search...

CURRENTLY SELECTED

- Products ✓
- Customer ✓
- Big Business
- Social Selling
- Pharmanex
- Not Clear Yet

Edit entry

Name: * Email: *

Social Media: Rating:

Focus: Intro Viewed:

Comments: To do next:

Next step date:

OCTOBER 2020

SU	MO	TU	WE	TH	FR	SA
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

Rate your prospect

Rating:

Search...

CURRENTLY SELECTED ✓

1. Not Interested
2. Shown interest
3. Interested
4. Very interested
5. Ready to get started

View history

Selected row will change color

Susana Test
[Edit](#) - [Delete](#) - [History](#)

01 Oct 2020 10:28
AM

susana@otg.global



[Edit](#) - [Delete](#) - [History](#)



Prospect History

Prospect Details

Name: su otro

Email: susana@otg.global

Added: 28-09-2020

Fecha	Details	Comments
2020-10-28 09:38:42	Video Watched	Video: BB II
2020-10-28 09:38:17	Registration Complete	
2020-10-27 11:57:02	Video Watched	Video: BB II
2020-10-27 11:53:32	Invitation Sent	Video: Introduction Mensaje: test
2020-10-16 17:07:06	Details Modified	Name: Eteelvina Email: support@otgwesteurope.eu Social Media: Rating: Focus: Not Clear Yet Comments: Sent a link now. already viewed :) To Do Next: Next Step Date:
2020-10-16 17:05:57	Video Watched	
2020-10-16 17:05:31	Registration Complete	
2020-10-15 19:54:27	Video Watched	
2020-10-15 19:53:56	Registration Complete	
2020-10-15 19:44:10	Invitation Sent	te mando este link

All the updates
shown in one
window

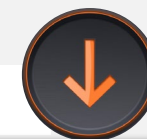
Organise your daily follow ups



Just click on any of the columns to sort
(by clicking twice you change from A-Z to Z-A)

- Who watched videos by date?
- What is my “next step date” today?
- Who registered in the past days?
- Who is rated “shown interest” and I have to call today?
- Or any other priority you might think of !

Click on any column title to **ORDER AZ or ZA**



Name	Invitation Sent	Email	Social Media	Rating	Focus	Registration	Intro Viewed	Video BB Viewed	Video BB II Viewed	Comments	To do next	Next step date
John Smith	28 Oct 2020 09:41 AM	John@Smith.com		4. Very interested	Not Clear Yet, Customer	27 Oct 2020 12:31 PM	27 Oct 2020 12:30 PM	28 Oct 2020 09:44 AM	27 Oct 2020 12:32 PM	great call	Zoom	21 Oct 2020
Lisa Jones	15 Oct 2020 01:34 PM	Lisa@Jones.com		1. Not Interested	Social Selling, Pharmanex	14 Oct 2020 09:25 AM		14 Oct 2020 09:25 AM	28 Sep 2020 11:43 AM	friend of Lucas	Zoom	05 Oct 2020
Peter Gomez		Peter@Gomez.es				08 Oct 2020 05:34 PM		24 Sep 2020 08:01 PM	24 Sep 2020 08:15 PM			
Rita Molly	28 Sep 2020 03:39 PM	Rita@Molly.uk		2. Shown interest		27 Oct 2020 12:10 PM	27 Oct 2020 12:11 PM			from the club	tennis class	04 Oct 2020
Gustav Kerr	27 Oct 2020 09:02 PM	Gustav@Kerr.se				12 Oct 2020 09:08 AM		12 Oct 2020 09:09 AM		Richard's cousin	call	05 Nov 2020
Susan Miller	28 Sep 2020 04:26 PM	Susan@Miller.no		4. Very interested		12 Oct 2020 11:18 AM		12 Oct 2020 11:19 AM		super interesting	call	14 Oct 2020

Search - Print – Export - +New Entry

- Looking for some specific info? just search on every data all at once
- Will be out in the country with no internet? Print your prospects list, or part of it to work
- Excel lover? Export your prospects list and work on any new plans you have
- Need to add someone but not sent invitation ? just fill in the form and add manually



My PRM Dashboard

Welcome You 😊

EMAIL INVITATION

SHARE INVITATION

TUTORIALS & HELP

Search table



SEARCH by any word on every column

pdf



PRINT

EXPORT



Excel

+ NEW ENTRY

ADD prospect manually



PRM



Adding prospects AUTOMATICALLY

Prospects will be automatically added to your dashboard if:

a. you send them an invitation using the

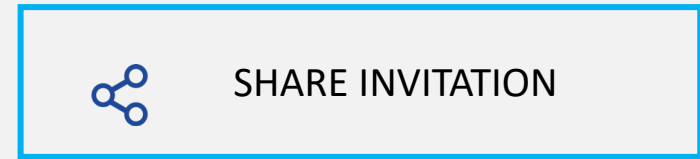
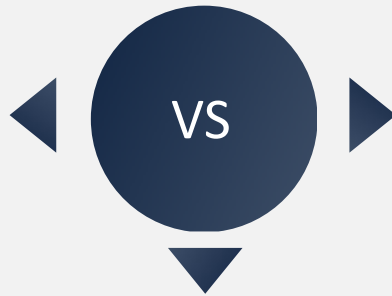
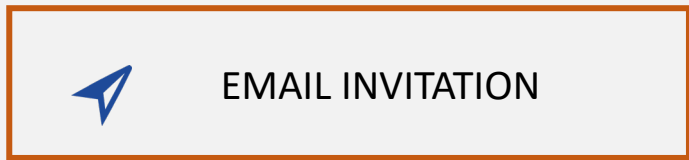


EMAIL INVITATION

b. only when the prospect registers to view the video,
after you sent a link using

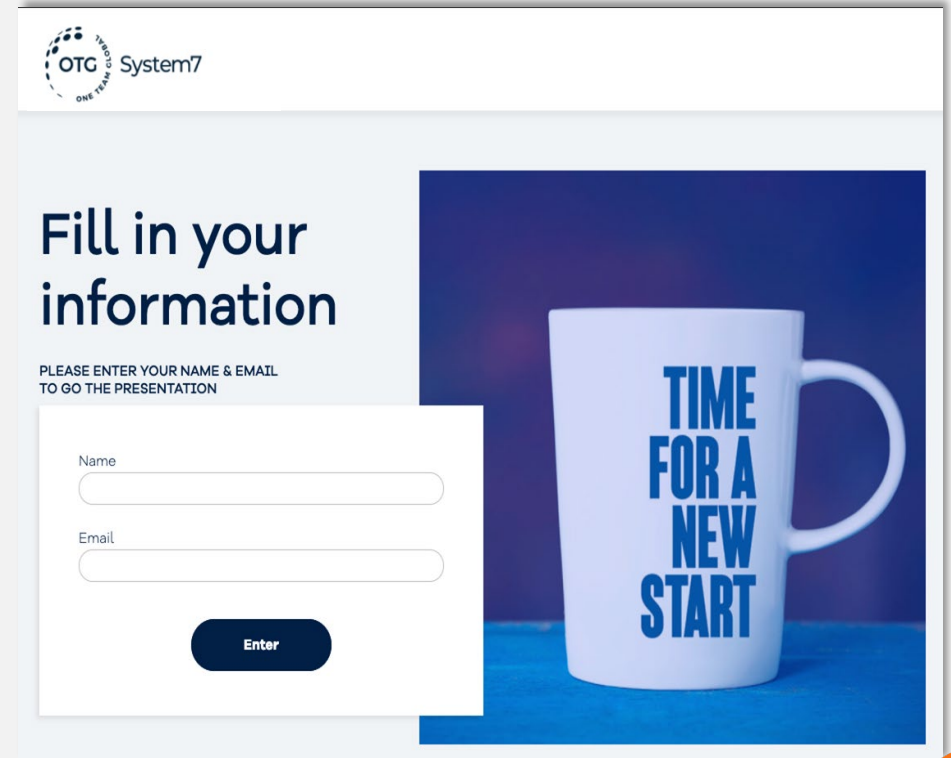
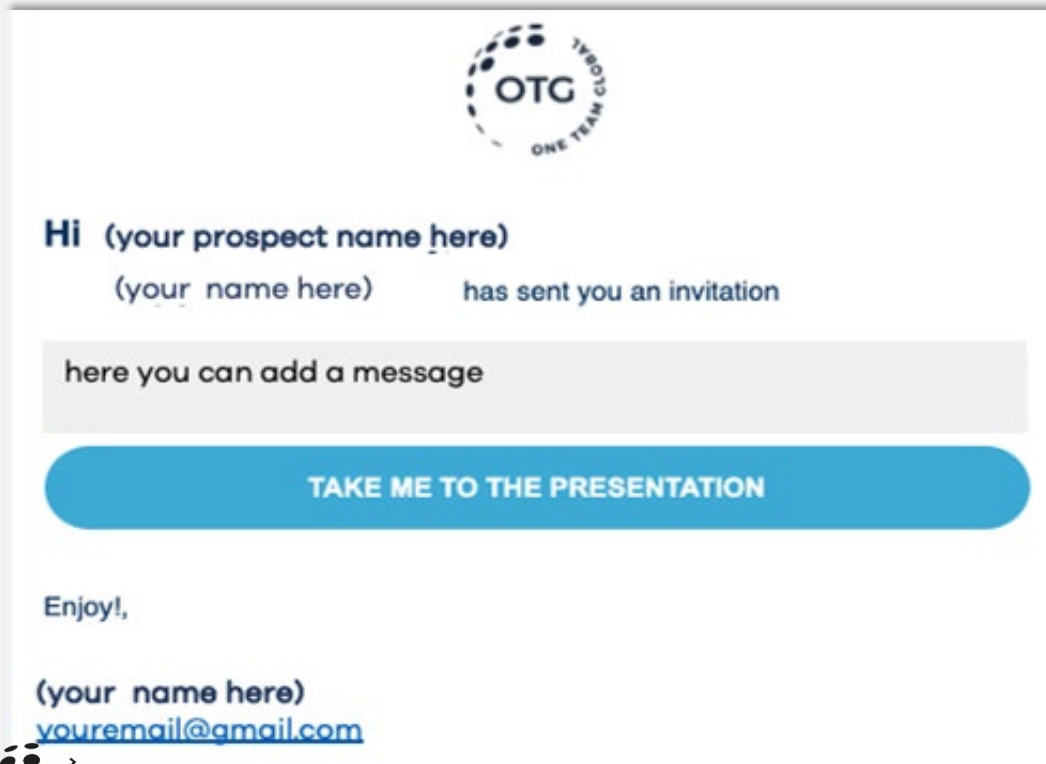


SHARE INVITATION





Your Prospect will receive this email:

Your Prospect will receive a link that will take him/her here:



What is the difference between Send and Share?

	 EMAIL INVITATION	 SHARE INVITATION
Invitation	Email sent through the system, sent from a "noreply" address YOUR NAME will appear on the subject	You share a link in a PM (Personal message) Messenger, Whatsapp etc.
Prospect data on your dashboard	Prospect name, date and email will be automatically added to your data base (or history if he is already in your DB)	Prospect name, date and email will be automatically added to your data base after registration.
Video view tracking	Prospect does not need to register to watch the video. Date and time of video watched will be added to your dashboard automatically.	Prospect needs to register (name and email only) if you want to track if the video was viewed. Date and time of video watched will be added to your dashboard


Adding Prospects MANUALLY

Add new entry ✕

Name: * Email: *

Social Media: Rating:


Focus: Intro Viewed:

Comments: 

To do next:

Next step date:

✕ CANCEL SUBMIT

Click on  **+ NEW ENTRY**
(top right on your dashboard).

 A pop up window will appear on your screen

My PRM Dashboard
Welcome María!

Your Name

 EMAIL INVITATION

 SHARE INVITATION

 TUTORIALS & HELP

 PRINT

 EXPORT

 **+ NEW ENTRY**

Name	Invitation Sent	Email	Social Media	Rating	Focus	Registration	Intro Viewed	Video BB Viewed	Video BB II Viewed	Comments	To do next	Next step date
Susan Barker	14 Oct 2020 09:09 AM	subarker@hotmail.com	https://www.facebook.co...	3. Interested	Social Selling	14 Oct 2020 09:55 AM		14 Oct 2020 09:58 AM		134 mil followers Yeah :-) I checked	coffee meeting / orning	31 Oct 2020