Toastmasters Lead Management System
Best Practices and Guidelines

TLM Best Practices

The Toastmasters Lead Management (TLM) program is an online tool for managing your District's Leads and prospecting activities. As you begin and continue to develop your strategy for the process of building new clubs, this document will serve as a point of reference for best practices and guidelines for using TLM.

Following these Best Practices will ensure the program works to its capacity as an efficient, optimal tool for managing Leads and activities. Questions regarding TLM Best Practices can be emailed to the WHQ Corporate Relations Specialist in **Corporate Relations** for assistance.

Browser
For optimal functionality use current browsers, such as Firefox, Chrome, Internet Explorer. It is recommended to clear your browser's cache and cookies on occasion for best performance.

Clearing Cache and Cookies:

Firefox
1. From the History menu > select Clear Recent History
2. From the Time range to clear: drop-down menu > select the desired range; to clear your entire cache, select Everything
3. Next to Details click the down arrow > choose which elements of the history to clear; to clear your entire cache, select all items

Chrome
1. Go to the Chrome menu icon > click "Settings"
2. Click "Show advanced settings" at the bottom
3. In the "Privacy" section > click "Content settings" button
4. In the "Cookies" section > Click "All cookies and site data"
1. To delete all cookies > click "Remove all" button

Internet Explorer
1. Go to the Chrome menu icon > click 'Tools'
2. Select Safety > Delete browsing history… OR Click Ctrl + Shift + Delete

Creating Leads

To best manage your leads and pipeline, it is important to avoid creating duplicate records. Duplicating efforts results in confusion for the lead and missed opportunity with other prospects.

▸ Prior to entering a new lead, search the TLM and confirm the contact does not exist as a current lead. If your lead already exists, discuss the status of the lead with the Assigned Owner before entering the lead's information.

Managing Leads

Complete and accurate data is critical to the successful management of each lead. It also allows your District to generate accurate reporting for current and future leadership to successfully manage your pipeline and transition your leads to new leadership at the beginning of each new program year.

▸ Complete all fields where you have information for the prospect. Note that certain fields are required to ensure necessary data capture.

▸ At the end of each program year, or when necessary, disqualify any lead that has not had contact or activity within six months. Delete any leads that are duplicates or were created in error; ensure they have no associated data or history. This allows future leadership to work from a clean, realistic list of prospects.

Recording your activity allows you to track conversations and manage upcoming tasks for each lead. From the lead record, enter Notes under the Pipeline Stage to document email or phone conversations, tasks, or events.

Pipeline

The Pipeline Stage process is designed to help manage the timely progression of a lead. It also serves as a valuable communication tool indicating the status of a lead for other District leaders. Each Pipeline Stage is defined and has timeline expectations for when to advance a lead to the next stage. As a lead progresses through the process use discipline in advancing them to the next Pipeline Stage.

Roles

Roles are a behind-the-scenes system process within TLM that allow for record ownership and visibility rights within the program.
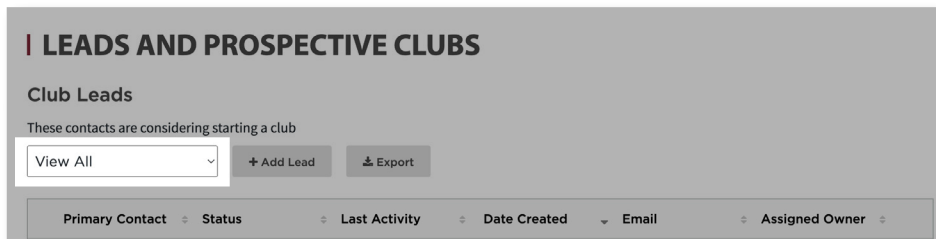
▸ Assigned Owner: This role indicates who currently owns the lead.

▸ District: This role determines visibility of the record for active District leaders within a District. Once the lead is assigned to a different District, District leaders within your District will not be able to view this lead record.

If you suspect you are not able to view all leads please contact the WHQ Corporate Relations Specialist in **Corporate Relations** for assistance.

List Views

Sorting through your records is easy with List Views. You have the option to view All Leads or view lead records by the Pipeline Stage. To select a List View, click the drop-down menu and select the preferred List View.

TLM Guidelines

We've provided detailed guidelines for using the Toastmasters Lead Management (TLM) system to best help you onboard new District leaders and to work in the TLM with ease and efficiency. Questions regarding TLM Guidelines can be emailed to the WHQ Corporate Relations Specialist in Corporate Relations for assistance.

Index

1. General Information
2. Initial Login and Setup
   a. Notifications
3. Creating Records
   a. Assigning an Assigned Owner
4. Accessing Records
   a. List Views: Standard
5. Managing Leads
   a. Tools
   b. Pipeline Stages
   c. Lead Status
   d. Required Fields
   e. Notes
   f. Split Districts
   g. Annual Transition of Leadership

General Information

Access to the TLM is provided for all District leaders with access to District Central, excluding the International Past District Director. Current District leaders will visit **toastmasters.org** and access District Central using their Toastmasters credentials to log in.

It is suggested the District Director, Program Quality Director, Club Growth Director, or club extension chair manage Start a Club leads through the TLM program. However, each District may determine which District leaders manage lead records as it best supports the District.

To help you best manage your lead records, WHQ will occasionally update lead records in the TLM to ensure all current District leaders have accessibility to your District's records. Updates include assigning roles such as Lead Owner or deleting lead records that have been inactive for six months or longer. Districts will be notified prior to any updates being made.

A TLM Training Webinar recording is posted to the Toastmasters website for reference.

▸ To access the recording, please visit the Toastmasters website **here**.

Initial Login and Setup

District leaders will visit www.toastmasters.org and access District Central using their Toastmasters credentials to log in.

▸ To access the TLM, click on the Leads and Prospective Clubs tile from the District Central table.

Notifications

Notifications are automated and sent by the TLM system when a lead assigned owner is initially assigned. This feature ensures you are informed of a lead record assignment.
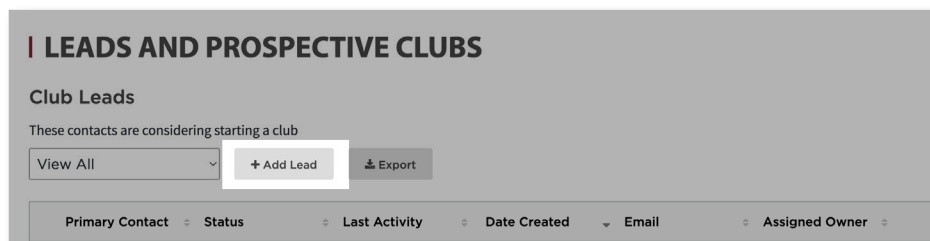
Creating Records

District Leaders can easily create lead records for each new prospective club. Here are a few reminders to remember when creating a new lead record.

▸ Search TLM to confirm the lead does not already exist to avoid duplicate records.

▸ Complete as many fields as you have the information for, especially pertinent contact information, to ensure concise documentation is communicated within your District.

To create a new lead follow these steps:

1. Click the Add Lead option next to the List View drop-down menu.

2. Assign the Assigned Owner; District number will auto-populate.

3. Enter the Lead's information in Primary Contact or Secondary Contact Information fields; such as name, email, phone number, address, and any other information you have for the contact.
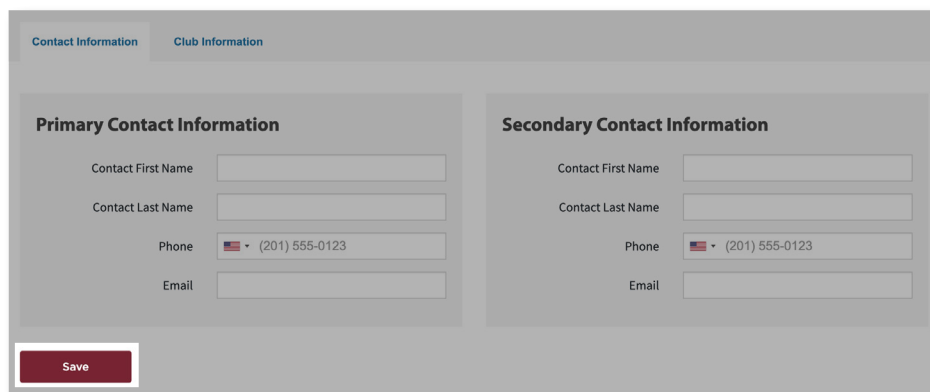
4. Click the Save button.

Assigning an Assigned Owner

At the time a new lead record is initially entered into TLM the Assigned Owner will receive an email notification stating they've been assigned a new lead record. If a lead is reassigned a notification will not be sent. Please contact the new Assigned Owner and notify them of this ownership change.

To assign a new Assigned Owner:

1. Click on the Assigned Owner field.
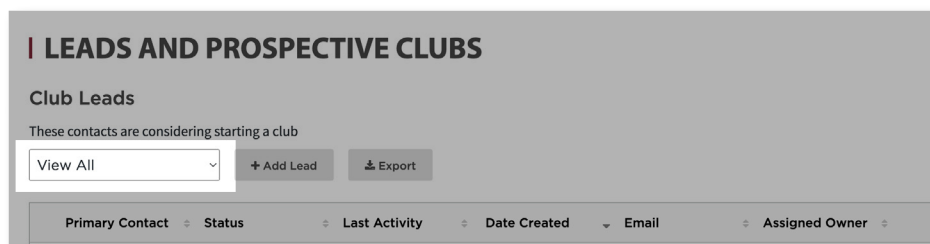
2. Type their First and Last Name into the Assigned Owner field.

3. Click Save.

In the event you need to assign a lead to a different District, please contact the WHQ Corporate Relations Specialist in **Corporate Relations** for assistance.

Accessing Records

Leads are quickly found in the Leads and Prospective Clubs table. Each time you enter the TLM you will start here. From this view you will be able to view and access all records assigned to you or your District by using List Views.

List Views

Sorting through your records is easy with List Views. You have the option to view All Leads or lead records by the Pipeline Stage. To select a List View, click the drop-down menu and select the preferred List View.

Managing Leads

Managing leads determines the success of a District. The following processes were designed with success and time management in mind. Use these stages at your discretion regarding when to advance each stage. Below are suggested timeframes.

Tools

The TLM List View features three tools to help you best manage your TLM List View and lead records – Edit, Delete, Expanded View.

1. Edit: This icon (box with a pencil) allows you to open and update the lead record as necessary.

2. Delete: This icon (trash can) allows you to delete the record only when the record was created in error or it is a duplicate of another lead record.

3. Expanded View: This icon (plus sign) allows you to expand the row for each lead to view additional information.

Pipeline Stages

Pipeline Stages assist in effectively managing your leads and communicating a lead's status to all District leaders. Each Pipeline stage is strategically defined, and timeline expectations are suggested for when the lead should be advanced.

Following are the Pipeline Stage definitions and timelines.

1. Initial Contact: Lead's contact information is entered, and initial contact needs to be made. Lead record will stay in this stage until the Intro Meeting is scheduled.

   a. TIMELINE: Initial contact should be made with the lead within 1 week of being added to TLM.

2. Pending Intro Meeting: Lead will advance to this stage once the Introduction Meeting is scheduled or active conversation is in progress to schedule an Introduction Meeting.

   a. TIMELINE: The Introduction Meeting should be scheduled, or completed, within 1-2 weeks of making the Initial Contact.

3. Pending Demo Meeting: Lead will advance to this stage once the Demonstration Meeting is scheduled or active conversation is in progress to schedule a Demonstration Meeting.

   a. TIMELINE: The Demonstration Meeting should be scheduled, or completed, within 1-2 weeks of conducting the Introduction Meeting.

4. Pending Application: Lead will advance to this stage once the ATO Form 1 is provided or completed and submitted to TI WHQ.

To advance a Pipeline Stage follow these instructions.

1. Click on the appropriate checkbox to indicate the lead status activity.

2. Click the Save button in the lower left corner.

Status

1. Disqualify/Close Lead: A lead should be disqualified if no response is received after two attempts to contact or they have declined interest in conversations.

2. Form Submitted: Once a lead submits the Application to Organize Form 1, click this button to update the lead to a Converted status. The lead will be removed from the TLM list view and appear in the Prospective Club list view once the New Clubs Team receives and processes the ATO paperwork.

Required Fields

Most fields found on the Start a Club form are required to guarantee District leaders have the necessary data to best manage leads. These fields also indicate the information that should be collected upon the first contact, or prior to contact if possible, with the lead. Start a Club form Required Fields include: First Name, Last Name, Email Address, Phone Number, Address and City.

When creating a lead manually using the Add Lead feature, these fields will not be required on the lead form. If a field is unknown enter UNKNOWN and update the field at a later date.

Notes

Notes allow you to track Tasks, Events, or Emails that have been completed or need to be completed for each lead. Tracking activity is a vital communication and lead management step in the TLM process.

To document a Note:

1. Click inside the Note dialog box and enter the Note reference. Click the Save button in the lower corner.

Split Districts

In the event your District experiences a split District the Corporate Relations and District Growth and Support Team will reassign Lead Assigned Owners accordingly. This will ensure you see only the leads that your District is managing.

To assign a new Assigned Owner:

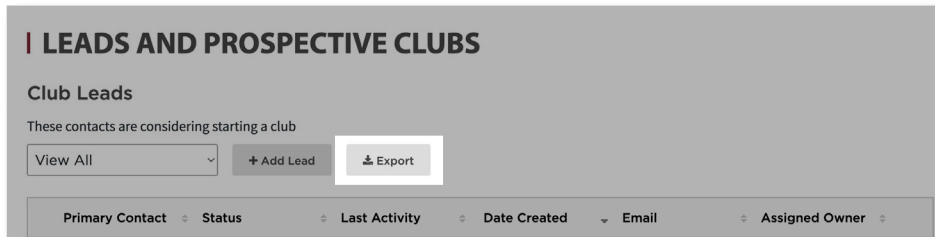▶ Type the new Assigned Owner's First and Last Name into the Assigned Owner field. Click the Save icon.

Annual Transition of Leadership

To best support your District and prepare for the leadership transition in July, it is strongly recommended all lead records are updated to reflect the lead's current Pipeline Stage and ensure key data fields are completed.

Additionally, export your lead records to be shared with outgoing and incoming District leaders. Outgoing leaders may continue to prospect existing Leads and incoming leaders are best served with an understanding of each Lead's status. From the Leads and Prospective Clubs dashboard view, click Export icon to the right of the List View drop-down menu. Follow the prompts.