

CRM SALES ROLE WORKFLOW

LOGIN & DASHBOARD



User logs in
Redirected
to their
dashboard

LEAD SOURCES

Leads come from multiple channels:



• Email



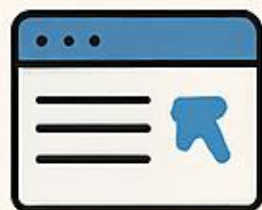
Website
Pop-Up



WhatsApp

WEBSITE POP-UP LEAD FLOW

Lead info automatically
integrated into CRM



Email sent to sales dubai@eiu.ac
Begins communication

ONLINE APPLICATION LEAD FLOW

Leads sent to sales.dubai@eiu.ac

Must be manually
entered into CRM



Students do NOT have
direct CRM access

SALES ROLE RESPONSIBILITIES



Collect all
required documents
Respond to
inquiries

LEAD CONVERSION & INVOICE

Assign lead to info.dubai@eiu.ac for conversion

Generate invoice

Send invoice
to student



LEAD CONVERSION & INVOICE



Assign lead to
info dubai
for conve



Assign lead to
info.dubai@eiu.ac
for conversion

