

Podcast Script: Web To Lead Form

Welcome to this 60 second Sugar snippet. My name is Susie Williams, and today we're going to talk about one of my favorite marketing features of Sugar, the Web to Lead form.

Sugar allows you to create this form automatically using a wizard-like interface launched from the Campaigns tab. Click on the "Create Lead Form" link to start the wizard. You can select what pieces of information you want to gather from your web visitors by dragging and dropping fields into one of two columns. Once you have selected your fields, you can edit the form header, form description, and Submit button label, and can designate a URL to direct your prospects to after the form has been submitted. By designating a campaign, "Assigned To" person, and Team, you can ensure that the lead will be sent to the right person for follow-up.

Once you have created the web to lead form, you can take the HTML and brand it with your own logo and colors, and generally make it look and feel like the rest of your website. Just keep the section of the code that writes the information into Sugar. You can use the built-in HTML editor or can modify the HTML using your own favorite web design tool.

Keep in mind that if you ask your prospects to fill out more information about themselves, fewer of them will respond. You need to strike a balance between what you absolutely need to know in order to qualify and route your leads. Remember that you can always add additional information as you work the lead and turn it into an opportunity. You don't want to ask too many prying questions so early in the relationship otherwise you'll scare off your prospects who don't want to volunteer that much information.

When you're done editing your page, host it on your company's website. When a prospect uses the page to request more information about your company, you can instantly see the lead in Sugar. You can also monitor the success of your campaign by clicking on the View Status button. You can see how many leads have been generated for that campaign, so you can determine how effective your efforts are.

The web to lead form can be an effective marketing lead generation tool to add to your sales machine. Try it out!

And that's your 60 Second Sugar Snippet. Goodbye!