Overview videos

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This article applies to:

CRM Overview

The Customer Relationship Management, or CRM area, contains all the customer related items including contacts, companies, opportunities, referral partners, visitors, and Zapier Integrations. This is where you can see your promoters, raving fans, and those folks that need a little more attention.

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CRM Reports Overview

Reporting on your contacts key activities is crucial to understanding the direction of your business, where it is, and where it should be. Here you can review reporting on your Referral Partner activities, as well as Sales metrics driven almost exclusively by your opportunities. With these reports, you get a birds-eye view of how your business is performing.

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CRM Settings Overview

CRM settings in Max Classic allow for the configuration of tags, tag categories, lead scoring and custom choices.

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Marketing Overview

The Marketing area includes Campaign Builder, Email & Broadcasts, Lead Generation, templates and more. This is where the heart of your marketing lives!

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Campaign Builder Overview

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Email Builder Overview

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Lifecycle Marketing Overview

Customize your sales and marketing strategy based on three stages of Lifecycle Marketing - Keap's proven framework for capturing leads, increasing sales and creating lifetime value for your customers. While these videos are a few years old, the methods and theories presented in them are still practical today!

For more on this topic, check out this current training from Keap Academy -

https://academy.keap.com/courses/lifecycle-automation

Download the Lifecycle Marketing Self Assessment PDF

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