

Update Lead

Please find below details on a lead which has been assigned to you.

You should update the lead status within **three days** of receiving the lead and either:

- change the **Lead Status** to **working** AND eventually **convert to a deal registration** if you accept the lead
- change the Lead Status to nurture or reject if the lead is not ready to make a purchase

Please refer to the Lead Management module of the [Blackboard Marketing Training course](#) for more information.

*** Status**

New

*** Reason**

- Not Applicable -

UPDATE LEAD

CANCEL

Once the lead is qualified and all of the required fields below are completed, you can submit as a deal registration pending approval using the Convert Lead button below.

CONVERT LEAD

Lead Details

*** Company**

Known Account

* First Name

* Last Name

Title

Job Title Category

- Select One -

Primary Role

Curriculum & Instruction

Market

Higher Ed.

Number of Days Since Lead was Assigned to You

Contact Information

*** E-Mail Address**

Phone Number

Mobile Phone Number

Address

City

State

Zip Code

Country

Lead Interest

Description

As you work your lead, please include as much information as possible. All the below information will be **required at the time you convert the Lead into a Deal registration**. To expedite the review process:

- Provide description of commitment from customer for a demo, reference call, etc to further define the opportunity
- Identify the roles in the procurement and document the decision process
- Provide a description of partner involvement thus far
- Any other pertinent information
- Required Deal Registration Questions for **RFP/RFI** please **download list of questions** for which we need answers. For an overview of the support available through the process, please access a presentation on the **Sales Tools page**
- Required Deal Registration information when requesting an **EVAL/PILOT environment for Learn SaaS** - please **download list of questions** for which we need answers. For an overview of the request process and to get help decide what is best for your customer needs, please access a presentation on the **Sales Tools page**

What problem are you trying to solve?

- Select One -

Lead Source

Website Contact Us

When do you plan on making a purchase?

- Select One -

Campaign ID

Campaign History

Campaign Name

Campaign Type

Go Back to Status Field

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Channel Partner Information

Partner Account

Lead Owner



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