Ticket - Lead Management Principle I/II

- A lead is the recognition/message of a customer need
- To better analyze our marketing events, lead management is integrated in our CRM
- We differentiate according to the following lead sources:

Lead source	Explanation	
Website/Browser	The customer came across us via any digital channel - website, social media, article in	
	online protal, online banners, google ads	
Campaign/Event	The client came to us via an Avesco event or Avesco campaign that was advertised on	
	media. If customer came from seen advertising of campaign, please specify media	
	channel on the list - radio, printed media, outdoor, TV, newsletter	
Third party recommendation	The customer came to us via recommendation.	
	Something like "My neigbour farmer recommended the Cat 444 to me"	
Customer Generated Lead	Customer xy contacts us independently without reference to the above mentioned events	
Self-Generated Lead	The sales consultant has lead "ripped out"	
Configurator	The lead came to us via configurator	

• If you choose the lead source "Campaign/Event", you have to select the appropriate campaign or event from the drop-down menu.
Each campaign has a start and end date. The campaigns are entered by Marketing. Only current campaigns can be selected

Ticket - Lead Management Principle II/II

Each lead has a lead status. The following statuses are available

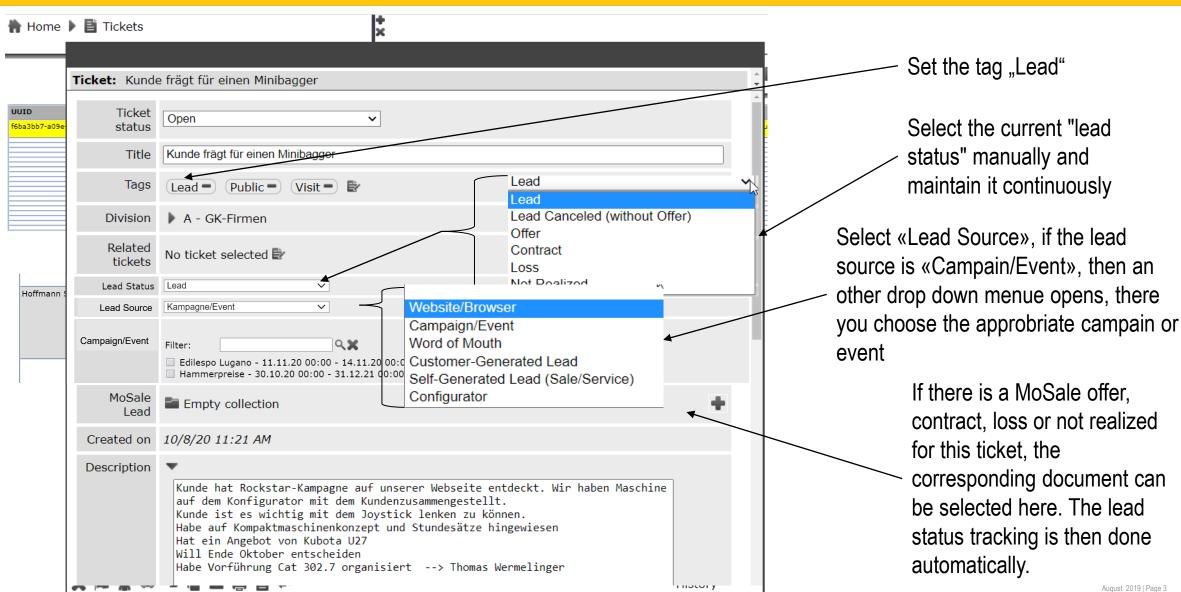
Lead Status	Explanations	
Lead	The lead is recognized	
Lead termination (without offer)	The lead became nothing, no offer, no order, no loss; this lead status can only generated if the predecessor status was "lead"	
Offer	An offer was created; this lead status can only generated if the predecessor status was "lead"	
Contract	A contract was created; this lead status can only generated if the predecessor status was "offer"	
Loss	A loss resulted from the offer; this lead status can only generated if the predecessor status was "offer"	
Not realized	From the offer nothing resulted; this lead status can only generated if the predecessor status was "offer"	

- A drop-down menu allows you to assign one or more MoSale documents to the lead. In this case, the lead statuses are automatically updated according to the MoSale status
- If there are several assigned MoSale documents, the following table applies to the lead status

MoSale Status	CRM Lead Status
At least one Mosale document with state offer	Offer
At least one MoSale document with state	
"Contract", rest "Lost" and/or "Not Realized"	Contract
At least one Mosale document with state	
"Loss", the remaining part "Not realized"	Loss
All MoSale Documents "Loss"	"loss"
All MoSale Documents "Not realized"	"Not realized"

- If there is no MoSale document for the corresponding lead, the status must be updated manually
- A lead ticket can only be closed from the lead status "Lead termination (without offer)", "Contract", "Loss", "Not realized"

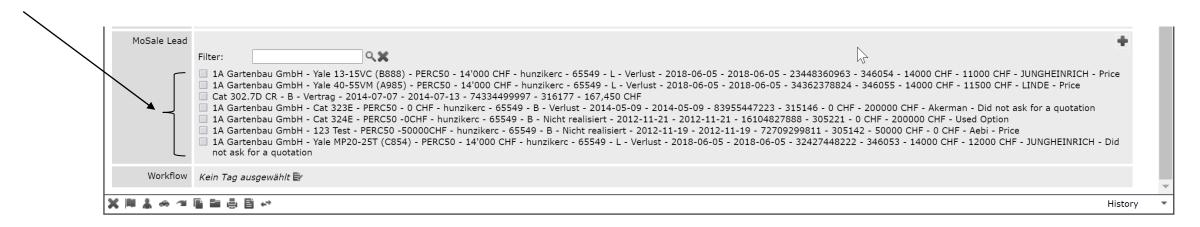
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Selection of the corresponding document



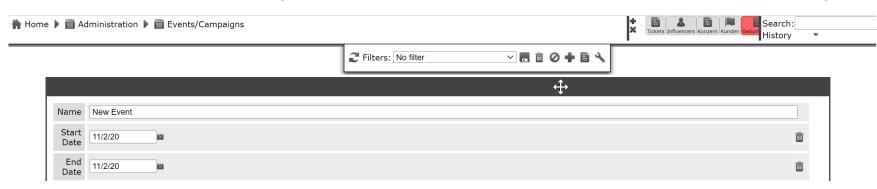
- MoSale documents are updated three times a day in CRM (morning, noon, evening)
- If a MoSale document is selected in the lead ticket, the lead status is automatically controlled according to MoSale

Create Campaigns/Events

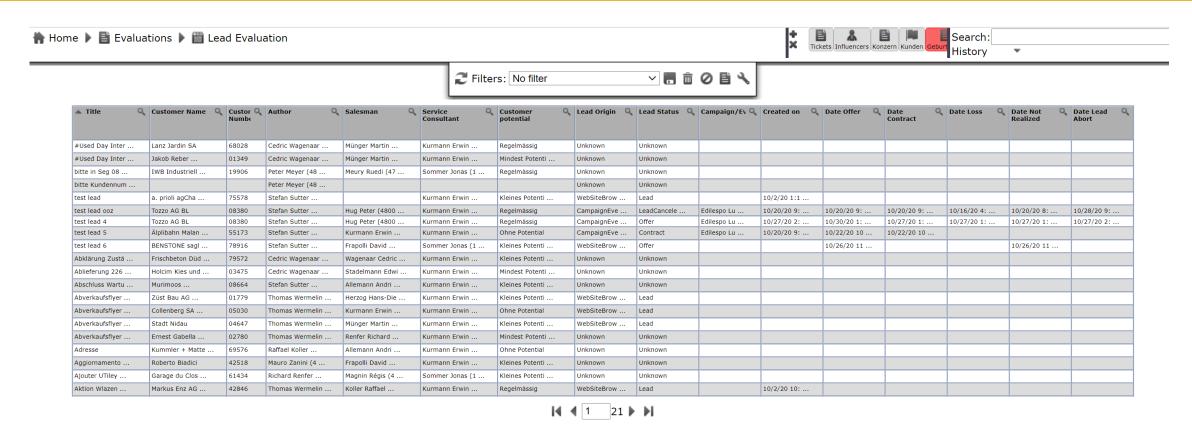
Open "Home/Administration/Events/Campaigns"



Push "+" and enter campaign name, start- and end-date. Put the end date four weeks longer, that the campaign duration.



Statistics Campaigns/Events



- Open "Home/Evaluation/Lead Evaluation"
- Download

 and sort as desired