

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 portal, 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 neighbour 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"

Ticket - Leadmanagement in CRM I/II

Home Tickets

Ticket: Kunde fragt für einen Minibagger

UUID
f6ba3bb7-a09e

Ticket status: Open

Title: Kunde fragt für einen Minibagger

Tags: **Lead** Public Visit

Division: A - GK-Firmen

Related tickets: No ticket selected

Lead Status: Lead

Lead Source: Kampagne/Event

Campaign/Event Filter:
☐ Edilespo Lugano - 11.11.20 00:00 - 14.11.20 00:00
☐ Hammerpreise - 30.10.20 00:00 - 31.12.21 00:00

MoSale Lead: Empty collection

Created on: 10/8/20 11:21 AM

Description:
Kunde hat Rockstar-Kampagne auf unserer Webseite entdeckt. Wir haben Maschine auf dem Konfigurator mit dem Kundenzusammengestellt.
Kunde ist es wichtig mit dem Joystick lenken zu können.
Habe auf Kompaktmaschinenkonzept und Stundesätze hingewiesen
Hat ein Angebot von Kubota U27
Will Ende Oktober entscheiden
Habe Vorführung Cat 302.7 organisiert --> Thomas Wermelinger

Lead
Lead
Lead Canceled (without Offer)
Offer
Contract
Loss
Not Realized
Website/Browser
Campaign/Event
Word of Mouth
Customer-Generated Lead
Self-Generated Lead (Sale/Service)
Configurator

Set the tag „Lead“

Select the current "lead status" manually and maintain it continuously

Select «Lead Source», if the lead source is «Campain/Event», then an other drop down menue opens, there you choose the appropbriate campain or event

If there is a MoSale offer, contract, loss or not realized for this ticket, the corresponding document can be selected here. The lead status tracking is then done automatically.

Ticket - Leadmanagement in CRM II/II

Selection of the corresponding document



The screenshot displays a CRM interface with a 'MoSale Lead' tab selected. A list of documents is shown, each with a checkbox and a detailed description. An arrow points from the text 'Selection of the corresponding document' to the list of documents.

MoSale Lead

Filter: 🔍 ✕

- ☐ 1A Gartenbau GmbH - Yale 13-15VC (B888) - PERC50 - 14'000 CHF - hunzikerc - 65549 - L - Verlust - 2018-06-05 - 2018-06-05 - 23448360963 - 346054 - 14000 CHF - 11000 CHF - JUNGHEINRICH - Price
- ☐ 1A Gartenbau GmbH - Yale 40-55VM (A985) - PERC50 - 14'000 CHF - hunzikerc - 65549 - L - Verlust - 2018-06-05 - 2018-06-05 - 34362378824 - 346055 - 14000 CHF - 11500 CHF - LINDE - Price
- ☐ Cat 302.7D CR - B - Vertrag - 2014-07-07 - 2014-07-13 - 74334499997 - 316177 - 167,450 CHF
- ☐ 1A Gartenbau GmbH - Cat 323E - PERC50 - 0 CHF - hunzikerc - 65549 - B - Verlust - 2014-05-09 - 2014-05-09 - 83955447223 - 315146 - 0 CHF - 200000 CHF - Akerman - Did not ask for a quotation
- ☐ 1A Gartenbau GmbH - Cat 324E - PERC50 - 0CHF - hunzikerc - 65549 - B - Nicht realisiert - 2012-11-21 - 2012-11-21 - 16104827888 - 305221 - 0 CHF - 200000 CHF - Used Option
- ☐ 1A Gartenbau GmbH - 123 Test - PERC50 - 50000CHF - hunzikerc - 65549 - B - Nicht realisiert - 2012-11-19 - 2012-11-19 - 72709299811 - 305142 - 50000 CHF - 0 CHF - Aebi - Price
- ☐ 1A Gartenbau GmbH - Yale MP20-25T (C854) - PERC50 - 14'000 CHF - hunzikerc - 65549 - L - Verlust - 2018-06-05 - 2018-06-05 - 32427448222 - 346053 - 14000 CHF - 12000 CHF - JUNGHEINRICH - Did not ask for a quotation

Workflow *Kein Tag ausgewählt*

History

- 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”

Home Administration Events/Campaigns

Tickets Influencers Konzern Kunden

Filters: No filter

Id	Name	Start Date	End Date
0	Edlespo Lugano	2020-11-11	2020-11-14
1	Hammerpreise	2020-10-30	2021-12-31

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

Home Administration Events/Campaigns

Tickets Influencers Konzern Kunden Geburt Search: History

Filters: No filter

New Event

Start Date11/2/20

End Date11/2/20

Statistics Campaigns/Events

Home ► Evaluations ► Lead Evaluation

Tickets
 Influencers
 Konzern
 Kunden
 Geburt
 Search:
 History

Filters: No filter

Title	Customer Name	Custor Numb	Author	Salesman	Service Consultant	Customer potential	Lead Origin	Lead Status	Campaign/Event	Created on	Date Offer	Date Contract	Date Loss	Date Not Realized	Date Lead Abort
#Used Day Inter ...	Lanz Jardin SA	68028	Cedric Wagenaar ...	Münger Martin ...	Kurmann Erwin ...	Regelmässig	Unknown	Unknown							
#Used Day Inter ...	Jakob Reber ...	01349	Cedric Wagenaar ...	Münger Martin ...	Kurmann Erwin ...	Mindest Potenti ...	Unknown	Unknown							
bitte in Seg 08 ...	IWB Industriell ...	19906	Peter Meyer (48 ...	Meury Ruedi (47 ...	Sommer Jonas (1 ...	Regelmässig	Unknown	Unknown							
bitte Kundennum ...			Peter Meyer (48 ...				Unknown	Unknown							
test lead	a. prioli agCha ...	75578	Stefan Sutter ...		Kurmann Erwin ...	Kleines Potenti ...	WebSiteBrow ...	Lead		10/2/20 1:1 ...					
test lead ooz	Tozzo AG BL	08380	Stefan Sutter ...	Hug Peter (4800 ...	Kurmann Erwin ...	Regelmässig	CampaignEve ...	LeadCancele ...	Edilespo Lu ...	10/20/20 9: ...	10/20/20 9: ...	10/20/20 9: ...	10/16/20 4: ...	10/20/20 8: ...	10/28/20 9: ...
test lead 4	Tozzo AG BL	08380	Stefan Sutter ...	Hug Peter (4800 ...	Kurmann Erwin ...	Regelmässig	CampaignEve ...	Offer	Edilespo Lu ...	10/27/20 2: ...	10/30/20 1: ...	10/27/20 1: ...	10/27/20 1: ...	10/27/20 1: ...	10/27/20 2: ...
test lead 5	Älplibahn Malan ...	55173	Stefan Sutter ...	Kurmann Erwin ...	Kurmann Erwin ...	Ohne Potential	CampaignEve ...	Contract	Edilespo Lu ...	10/20/20 9: ...	10/22/20 10 ...	10/22/20 10 ...			
test lead 6	BENSTONE sagl ...	78916	Stefan Sutter ...	Frapolli David ...	Sommer Jonas (1 ...	Kleines Potenti ...	WebSiteBrow ...	Offer			10/26/20 11 ...			10/26/20 11 ...	
Abklärung Zustä ...	Frischbeton Düd ...	79572	Cedric Wagenaar ...	Wagenaar Cedric ...	Kurmann Erwin ...	Kleines Potenti ...	Unknown	Unknown							
Ablieferung 226 ...	Holcim Kies und ...	03475	Cedric Wagenaar ...	Stadelmann Edwi ...	Kurmann Erwin ...	Mindest Potenti ...	Unknown	Unknown							
Abschluss Wartu ...	Murimoos ...	08664	Stefan Sutter ...	Allemann Andri ...	Kurmann Erwin ...	Kleines Potenti ...	Unknown	Unknown							
Abverkaufsflyer ...	Züst Bau AG ...	01779	Thomas Wermelin ...	Herzog Hans-Die ...	Kurmann Erwin ...	Kleines Potenti ...	WebSiteBrow ...	Lead							
Abverkaufsflyer ...	Collenberg SA ...	05030	Thomas Wermelin ...	Kurmann Erwin ...	Kurmann Erwin ...	Ohne Potential	WebSiteBrow ...	Lead							
Abverkaufsflyer ...	Stadt Nidau	04647	Thomas Wermelin ...	Münger Martin ...	Kurmann Erwin ...	Kleines Potenti ...	WebSiteBrow ...	Lead							
Abverkaufsflyer ...	Ernest Gabella ...	02780	Thomas Wermelin ...	Renfer Richard ...	Kurmann Erwin ...	Mindest Potenti ...	Unknown	Unknown							
Adresse	Kummler + Matte ...	69576	Raffael Koller ...	Allemann Andri ...	Kurmann Erwin ...	Ohne Potential	Unknown	Unknown							
Aggiornamento ...	Roberto Biadici	42518	Mauro Zanini (4 ...	Frapolli David ...	Kurmann Erwin ...	Kleines Potenti ...	Unknown	Unknown							
Ajouter UTiley ...	Garage du Clos ...	61434	Richard Renfer ...	Magnin Régis (4 ...	Sommer Jonas (1 ...	Kleines Potenti ...	Unknown	Unknown							
Aktion Wlazen ...	Markus Enz AG ...	42846	Thomas Wermelin ...	Koller Raffael ...	Kurmann Erwin ...	Regelmässig	WebSiteBrow ...	Lead		10/2/20 10: ...					

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- Open “Home/Evaluation/Lead Evaluation”
- Download and sort as desired