Content

Unable to Prioritize lead Effectively - Key Challenge

Lead Sources

- Phone
- Email
- Website
- Referrals
- Webform
- Chat
- External
- Internal
- Manual

High Volume Leads

All Leads routed to sales without any logic/scoring

Sales Agent

Sales Agents can't reach the best lead quickly

Wasting time on Junk Leads which don't lead to sale

Leads not routed to correct sales group
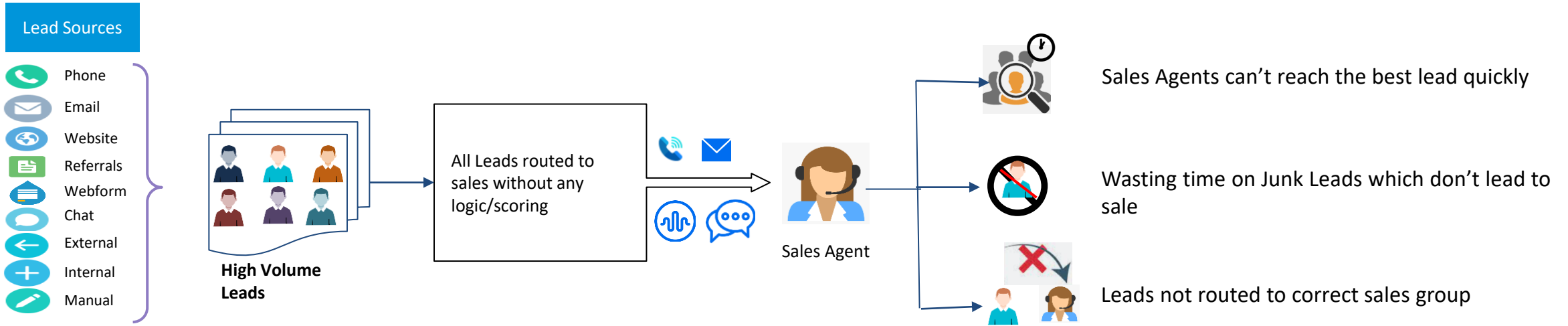
Leads list without Prioritization

Leads
All Open Leads ▼

New | Import | Add to Campaign

50+ items sorted by Name · Filtered by all leads · Updated a few seconds ago

Search this list...

	NAME ↑	∨	COMPANY	∨	PHONE	∨	EMAIL	∨	LEAD STATUS	∨	LEAD SOURCE	∨
1	Andy Young		Dickenson plc		(620) 241-6200		a_young@dickenso...		Closed - Converted		Purchased List	▼
2	Bertha Boxer		Farmers Coop. of Fl...		(850) 644-4200		bertha@fcof.net		Working - Contacted		Web	▼
3	Betty Bair		American Banking ...		(610) 265-9100		bblair@abankingco...		Nurturing - Contact...		Purchased List	▼
4	Bill Dadio Jr		Zenith Industrial Pa...		(614) 431-5000		bill_dadio@zenith.c...		Closed - Not Conver...		Web	▼
5	Brenda Mcclure		Cadinal Inc.		(847) 262-5000		brenda@cardinal.net		Working - Contacted		Web	▼

- Less Lead Conversion Rate 👎
- Loss of Revenue 👎
- Waste of Sales Time 👎
- Sales Reps spread their efforts equally across all Leads 😞
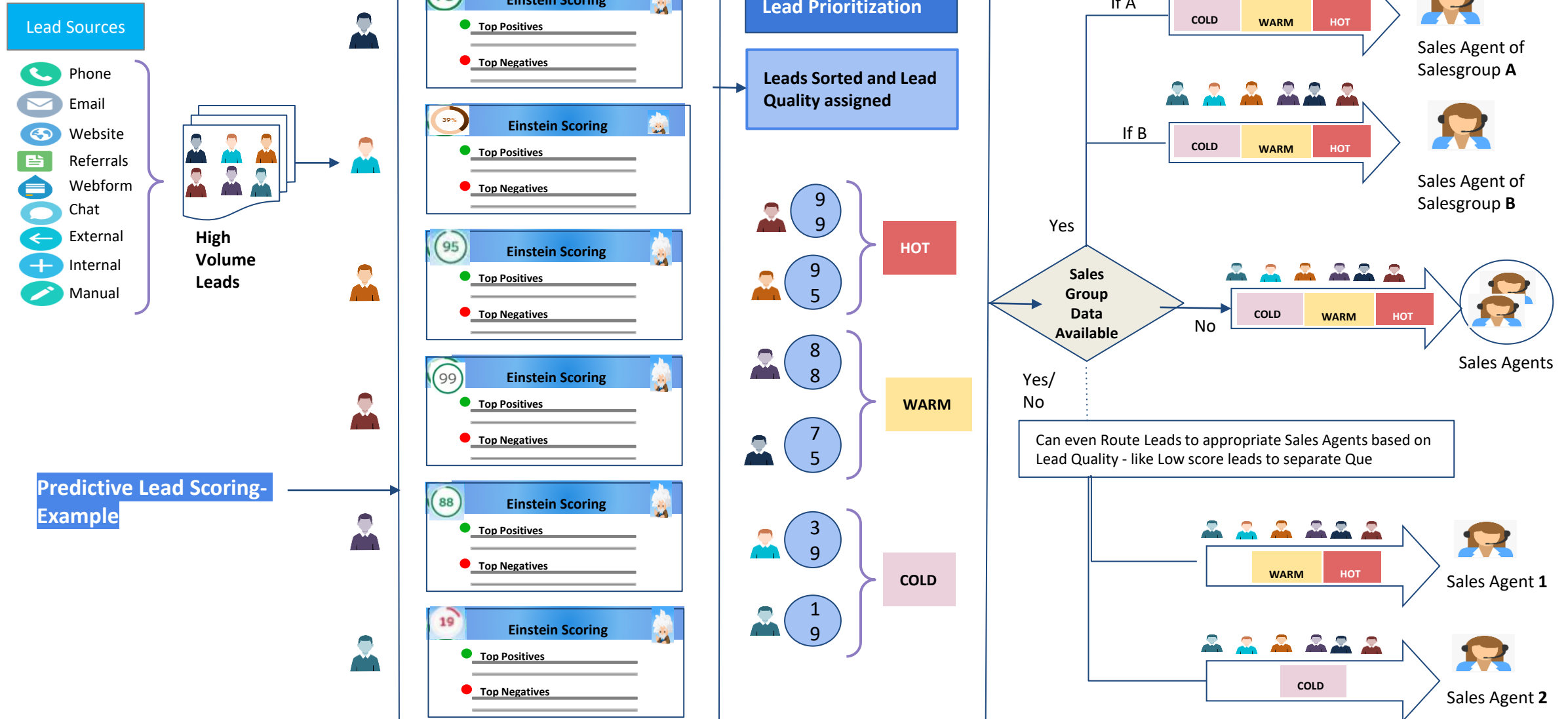- Leads not routed effectively 👎

Unable to Prioritize lead Effectively - Predictive lead scoring - Transformation
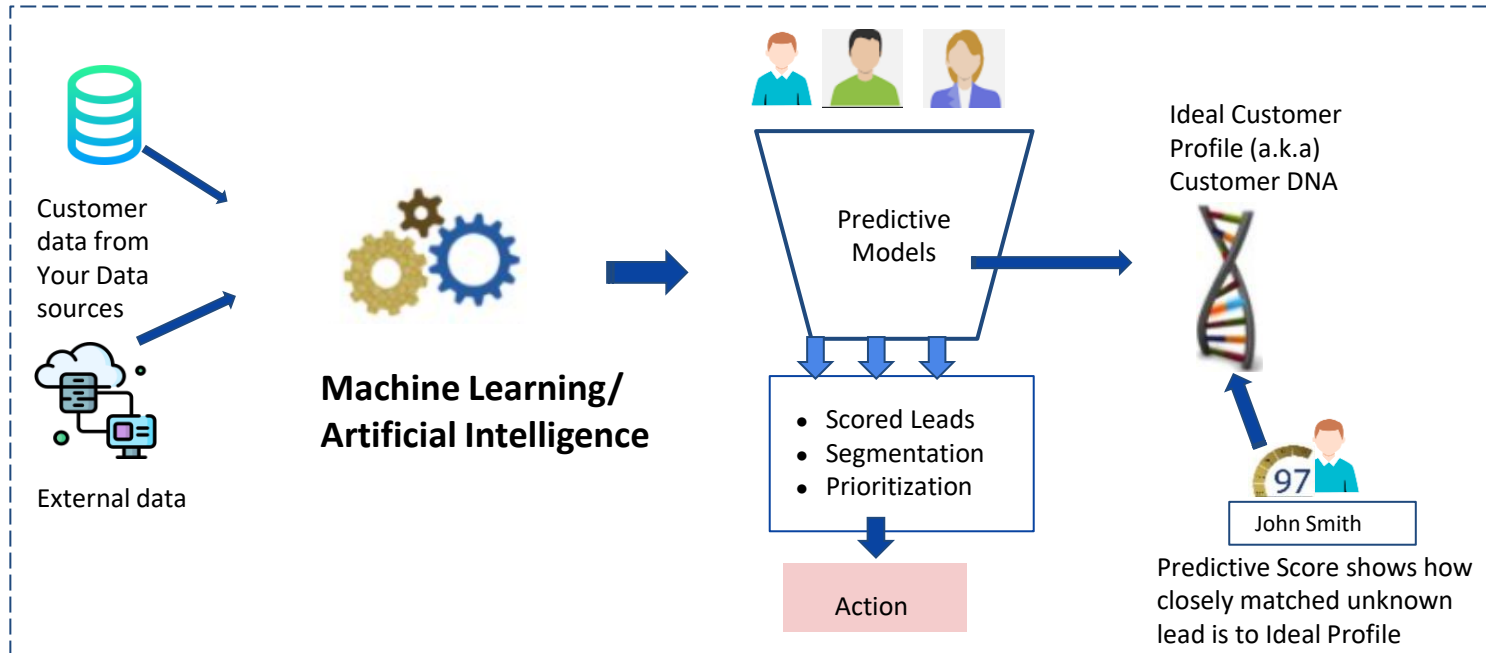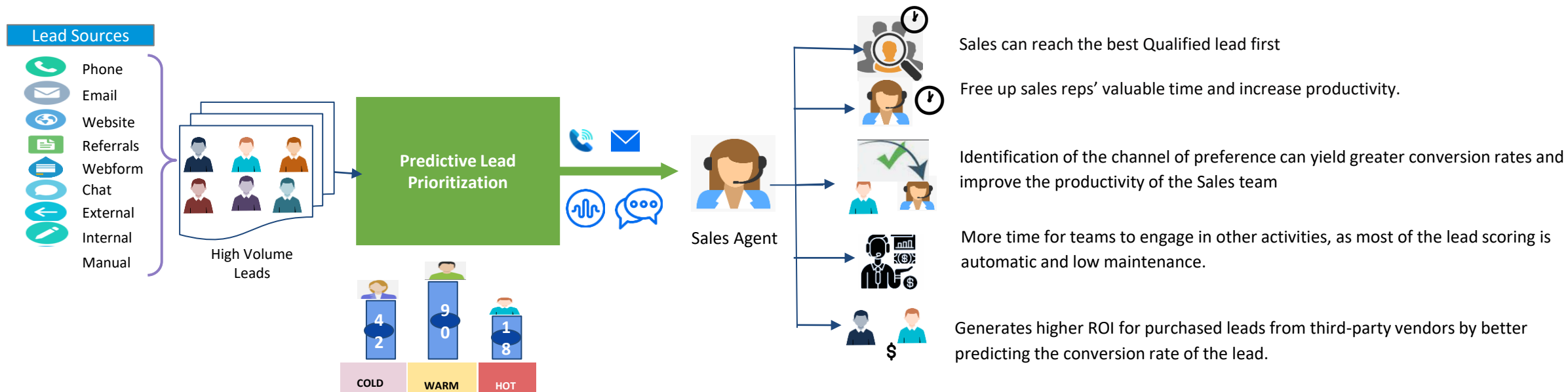

- Salesforce offers customizable, automated solutions for lead scoring and grading

- Einstein Lead Scoring uses data science and machine learning to discover business's patterns of lead conversion

- Einstein analyzes past leads to determine which current leads have the most in common with leads that have previously converted

- Einstein reanalyzes lead data every few days and refreshes scores. So if new trends emerge, Einstein won't miss them.

- The Predictive Lead Scoring model utilizes certain Key Attributes like
  - Customer Data: like Job Title, Address, Date of Birth, Name, Age, credit score,sector of employment
  - Customer Purchase Data: (external Source) purchase history information like Money Spent on Buying the Products, Frequency of Purchases, Online or Offline Payments done, etc.
  - Customer Engagement Data: online behavior like the Number of Times the Page was Viewed, etc.
  - Account Profile Data: information about the Account Type, Company Size, etc(B2B)
  - Marketing and Sales Campaign insights
  - Macro data : like unemployment rate, local inventory, mortgage rates
  - For few more attributes taht can be considered : Refer : Lead Scoring

Predictive Lead Scoring - Transformation (Contd..)

How will the solution benefit ?

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High Volume Leads

Predictive Lead Prioritization

Sales Agent

COLD WARM HOT

Sales can reach the best Qualified lead first

Free up sales reps' valuable time and increase productivity.

Identification of the channel of preference can yield greater conversion rates and improve the productivity of the Sales team

More time for teams to engage in other activities, as most of the lead scoring is automatic and low maintenance.

Generates higher ROI for purchased leads from third-party vendors by better predicting the conversion rate of the lead.

Persons
Today's Persons ▾ 📌

ms • Sorted by Lead Quality • Filtered by All persons - Created Date • Updated 2 minutes ago

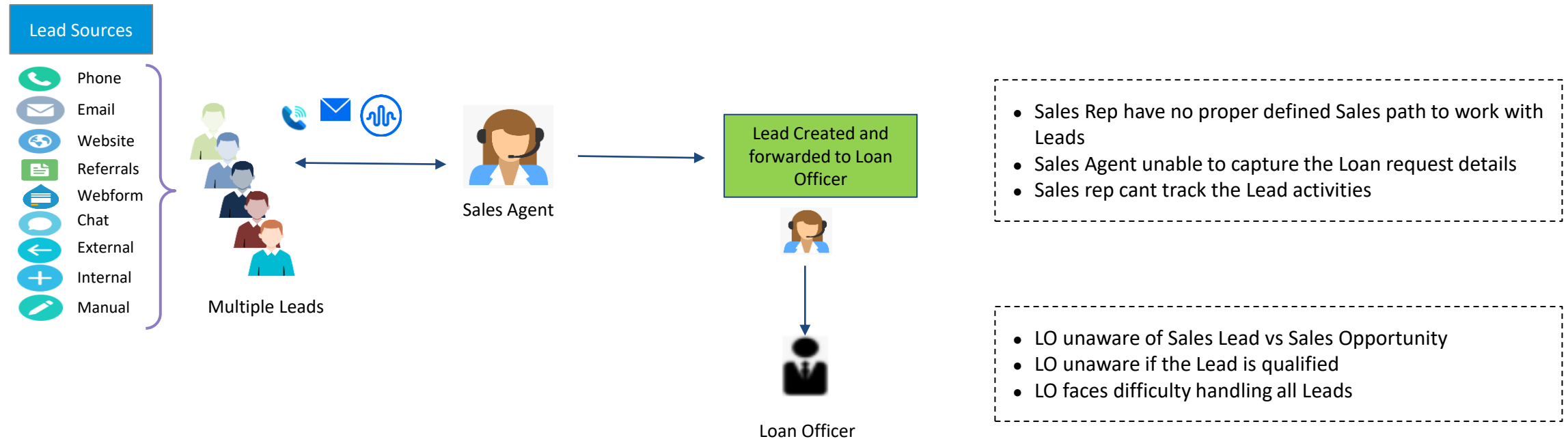|	Name	Company	St...	Lead Score	Lead Qu... ↑	Person S
☐	Grant Carroll	Microsoft Natur...		73	Hot	New
☐	Carlos Daly	DS/HD IBM For...		71	Hot	New
☐	Sylvia Foulston	Lesro Sheffield ...		68	Hot	New
☐	Joy Bell	Deflect-o Rolla...		67	Hot	New
☐	Carl Ludwig	Maxell 3.5" DS/...		66	Hot	New
☐	Grant Carroll	Bush Heritage Pi...		65	Hot	New
☐	Eugene Barchas	Hon Every-Day...		64	Hot	New
☐	Jim Radford	g520		59	Warm	New
☐	Carlos Soltero	Tenex Personal ...		59	Warm	New
☐	Andrew Gjertsen	Crate-A-Files™		59	Warm	New
☐	Beth Paige	Luxo Profession...		59	Warm	New

Leads list with Prioritization

- Agents will be able to view the **Lead score** and **Lead Quality** and reach out to the HOT leads first and then Warm leads
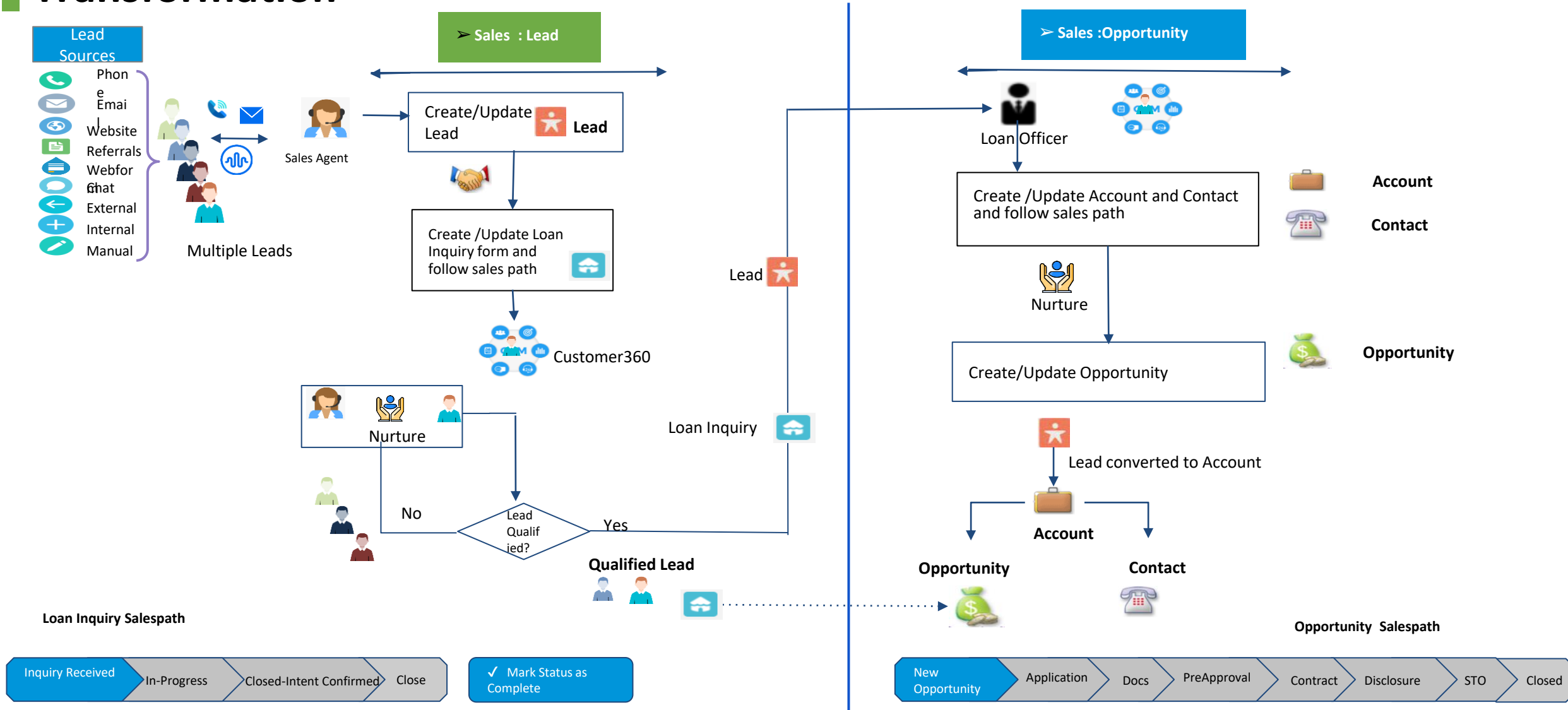
- Nurture the Cold leads

- More Lead Conversion Rate 👍
- Increased ROI 👍
- Improved Sales Productivity 👍
- Sales Reps put their efforts on best Leads 😊
- Leads routed effectively 👍

Distinction between Sales lead vs Sales Opportunity - Key Challenge

Lead Sources

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Multiple Leads

Sales Agent

Lead Created and forwarded to Loan Officer

Loan Officer

- Sales Rep have no proper defined Sales path to work with Leads
- Sales Agent unable to capture the Loan request details
- Sales rep cant track the Lead activities

- LO unaware of Sales Lead vs Sales Opportunity
- LO unaware if the Lead is qualified
- LO faces difficulty handling all Leads

Distinction between Sales lead vs Sales Opportunity - Transformation

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Sales Agent

Multiple Leads

➢ **Sales : Lead**

Create/Update Lead — **Lead**

Create /Update Loan Inquiry form and follow sales path

Customer360

Nurture

Lead Qualified?
- No
- Yes

Qualified Lead

Lead

Loan Inquiry

➢ **Sales :Opportunity**

Loan Officer

Create /Update Account and Contact and follow sales path

Account

Contact

Nurture

Create/Update Opportunity

Opportunity

Lead converted to Account

Account

Opportunity   **Contact**

Loan Inquiry Salespath

| Inquiry Received | In-Progress | Closed-Intent Confirmed | Close |

✓ Mark Status as Complete

Opportunity Salespath

| New Opportunity | Application | Docs | PreApproval | Contract | Disclosure | STO | Closed |

How will the solution benefit ?

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Multiple Leads

Sales Agent

Loan Officer

- Sales Rep have Loan Inquiry Sales path defined to work with Leads
- Sales Agent able to capture the Loan request details
- Sales rep can track the Lead activities

- Qualified Lead to LO
- Defined Opportunity Sales path.
- Upsells or Cross-sells if applicable

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