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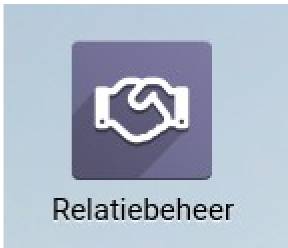
CRM – From Lead to Customer

First things first

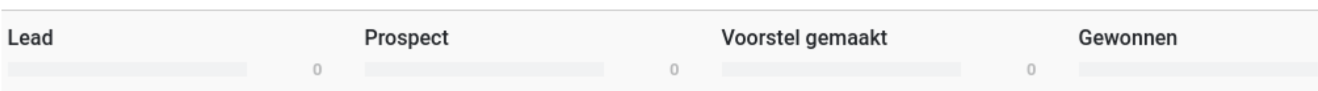


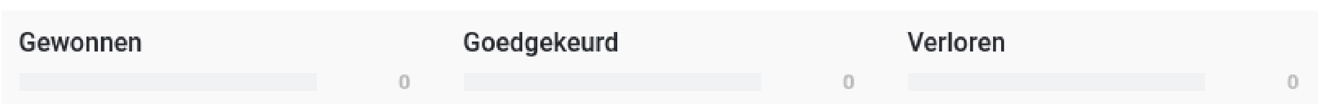
To open the CRM application we have to click on the CRM Module

The view that opens is your **personal** collection of leads/prospects.
This is clearly visible in the search bar 

Stages

There are predefined stages that leads will go through.
These are visible in the Kanban view.





When initially making a new Lead, it will start in the equally named stage “Lead”

Make a Lead

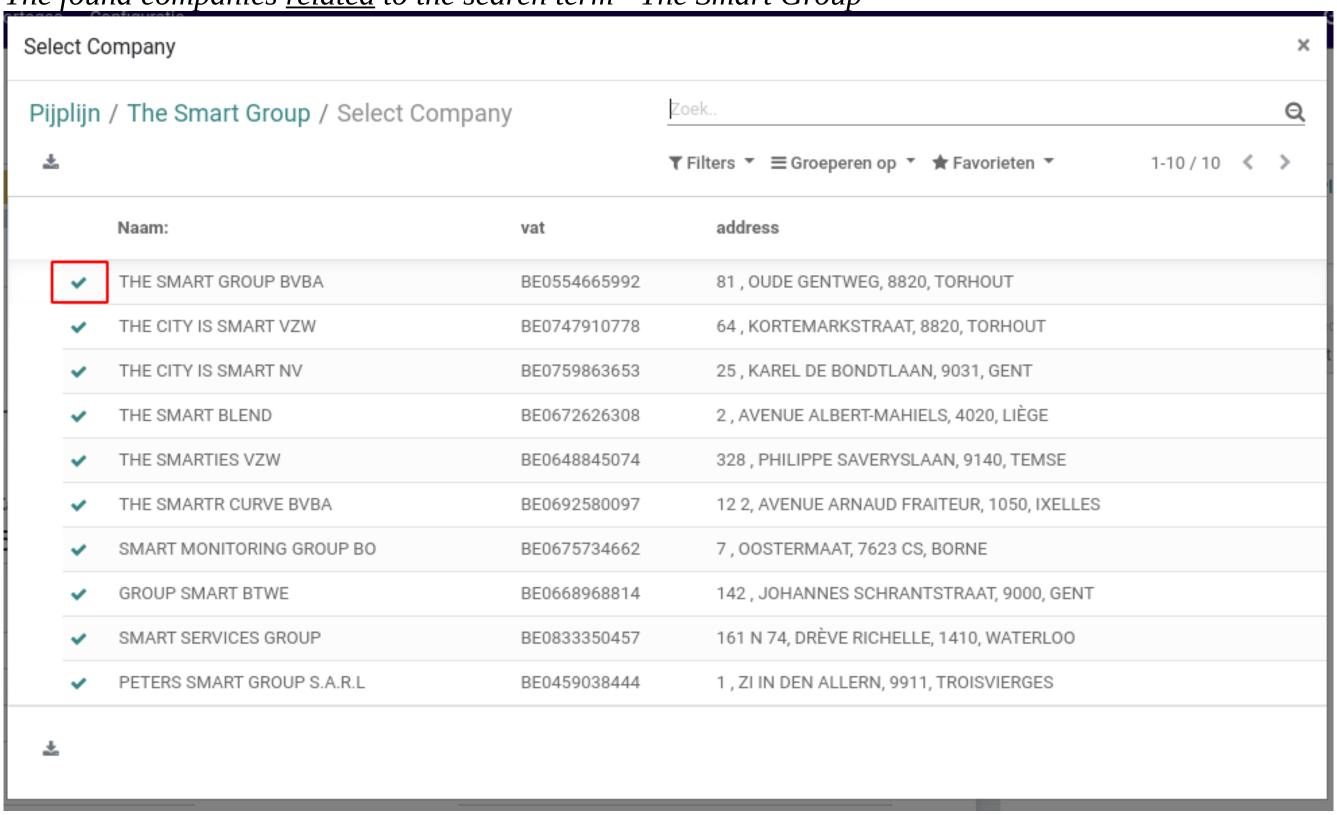
To make a lead, press the Green button on the top of the screen
This will open the detail page.

By Name

Here we can enter the name of the lead.
Once we go out of the field (by clicking or with TAB), we'll see a "Search" button.

This button will show you the top 10 companies found with a similar name.

The found companies related to the search term "The Smart Group"



Naam:	vat	address
THE SMART GROUP BVBA	BE0554665992	81 , OUDE GENTWEG, 8820, TORHOUT
THE CITY IS SMART VZW	BE0747910778	64 , KORTEMARKSTRAAT, 8820, TORHOUT
THE CITY IS SMART NV	BE0759863653	25 , KAREL DE BONDTLAAN, 9031, GENT
THE SMART BLEND	BE0672626308	2 , AVENUE ALBERT-MAHIELS, 4020, LIÈGE
THE SMARTIES VZW	BE0648845074	328 , PHILIPPE SAVERYSLAAN, 9140, TEMSE
THE SMARTR CURVE BVBA	BE0692580097	12 2, AVENUE ARNAUD FRAITEUR, 1050, IXELLES
SMART MONITORING GROUP BO	BE0675734662	7 , OOSTERMAAT, 7623 CS, BORNE
GROUP SMART BTWE	BE0668968814	142 , JOHANNES SCHRANTSTRAAT, 9000, GENT
SMART SERVICES GROUP	BE0833350457	161 N 74, DRÈVE RICHELLE, 1410, WATERLOO
PETERS SMART GROUP S.A.R.L	BE0459038444	1 , ZI IN DEN ALLERN, 9911, TROISVIERGES

Once you've found the company you're looking for, select the check-icon in front of it.
This will automatically fill in all known fields for you!
As an extra, it'll show you the financial history (if found) in the tab called "CreditSafe".

By VAT number

The same is possible if we enter a vat number.
Provided it's a valid number, Odoo will **automatically** fill in all known field.
(See the "By Name" up top to know what is filled in)

Colors and Icons

On the detail page
After using one of the above methods (By name / By VAT), you can see an icon appear in front of the name.

The company is a low risk & a has high credibility

The company is a medium risk – Proceed only on good trust

The company is a high risk – Not recommended!

On the overview page(s)
Green text will indicate a low risk
Orange text will indicate a medium risk
Red text will indicate a high risk

Referenced By

If a Customer brought you a reference, you can fill this in on your Lead!
The field is conveniently called **Referenced By**.
Later, when the Lead/Prospect becomes a customer, this reference will be noted on the customer that gave the reference (WIP - WORK IN PROGRESS)

Hot & Cold Leads

When creating a new Lead, the Lead Type will be **Hot**
If your Lead/Prospect loses interest, but is not completely lost, the status **Cold** must be applied.

On the overview pages we can view several optimizations regarding the Lead Type:
1. The icon in front of the name is according the the Lead Type

Hot Leads Cold Leads

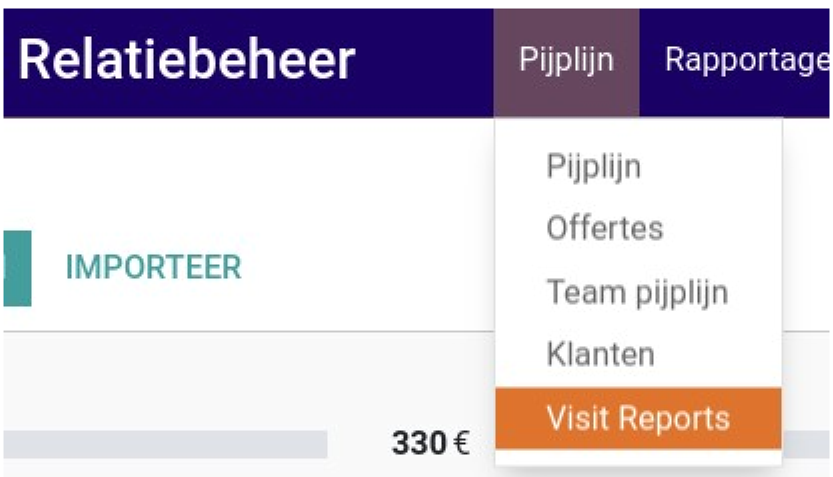
2. We have filters to specifically … filter

Visit Reports

What and why

Visit reports will be used to track what went on during the visit.
It's a good habit to note down your experiences after your visit (while it's still ***fresh***)!
Later, when you'll do a follow-up visit, or a colleague visits the prospect/customer you/they will have a complete overview of what went on last time(s).

Where to find all visit reports



How to use

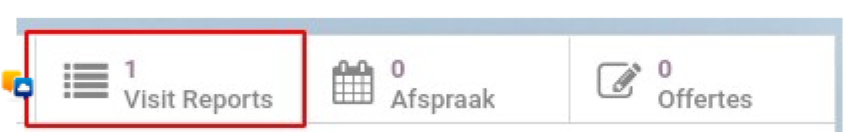
Inside the detail of a Lead, we can press the very visible button "Visit Report"
This will open a new detail: The Visit Report!!

The name is automatically filled in for you, as well as the Lead.
Now, it's your responsibility to acknowledge if the Lead/Prospect was satisfied and note down why (not).

The field "**Proposed Products**":
This is especially usefull late on, since we can track back what products were proposed / talked about in that specific visit. You can put anything in there (pictures / tables / ...)!

! Don't forget to save !

You can always see all visit reports inside your Lead/Prospect detail page
Clicking on it will give you a list of all the reports



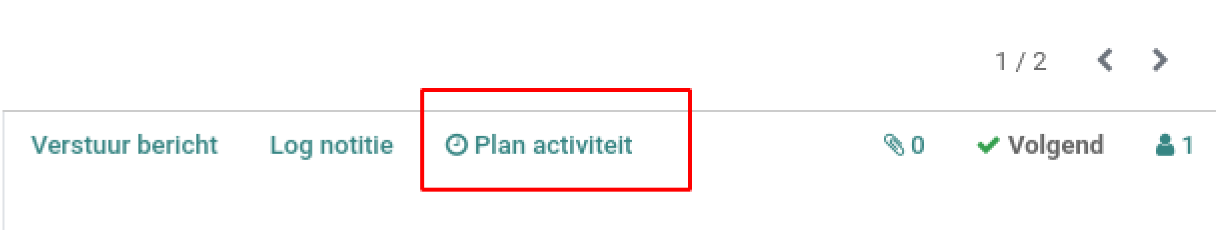
The CRM Flow

More important, how does a Lead become a Customer!

1. Make a Lead

As already explained above, use the “Make” button.
Fill in (or let CreditSafe do all the work) all needed fields.

! TIP OF THE DAY !
Use the standard “Plan Activity” functionallity to let Odoo remind you when to call / email / …



2. Plan a visit

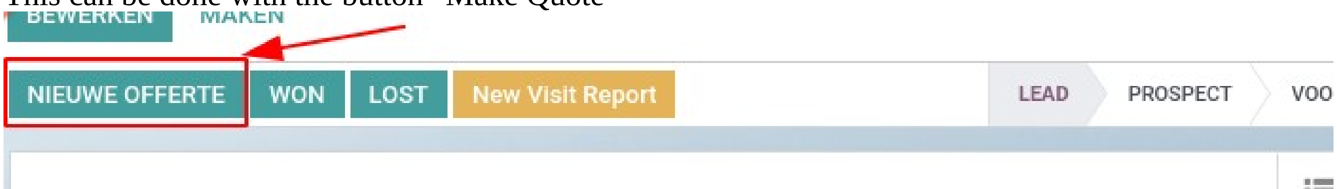
After doing this, you can select the stage “Prospect”
We prefer you do this in Odoo, with the Schedule button

3. Write your Visit Report

After your visit, try to do this as soon as possible.

4. Make a Proposition

This can be done with the button “Make Quote”



Odoo will ask you to make a Customer from this prospect OR use an already existing customer (only if you’ve already made one!)
After this step, the stage will automatically change to “Proposition Made”

5. Mark as WON or lost

We all hope it’s the first one