Leads

Version 8.0

Table of Contents

Create a lead 4

Lead management process 5

Qualification 6

Nurturing 6

Proceed to handoff 7

Awaiting sale 8

Lead duplicate search 8

Predictive scoring of leads 9

Launch of predictive scoring 10

Data processed during predictive scoring calculation 11

Leads FAQ 12

How to assign the owner of a lead? 12

What is the purpose of “Continue nurturing”? 12

What is the difference between the lead source and lead channel? 12

What is the difference between the [Account] and [Account name] fields on the lead page? 12

What is the logic of automatic contact creation? 13

What data from the lead page are passed to the contact page? 13

How does the contact and account search work when qualifying a lead? 13

How to start the lead management process? 14

How to disable a base sub-process? 14

How to change the standard lead management process? How do I add or modify process stages? 14

How to search for duplicates? 15

How is the [Extended lead information] detail populated? 15

Create a lead

PRODUCTS: MARKETING SALES CREATIO

A lead is an interest in your products expressed by a potential customer. For example, new leads emerge if new users have registered on your website or if you receive a call from a contact who was previously interested in your services. With Creatio leads, you can work both with the customers who are ready to make a deal or those who need some more time to consider a purchase.

In Creatio, a lead can be created in the following ways:

- added manually in the [*Leads*] section
- imported from Excel
- created automatically via registering on a landing page.

> **Note.** If the [*Create contact*] checkbox is selected for a webpage in the "Landings" section, then when a consumer fills in the form of this landing, Creatio automatically creates a lead and a contact.

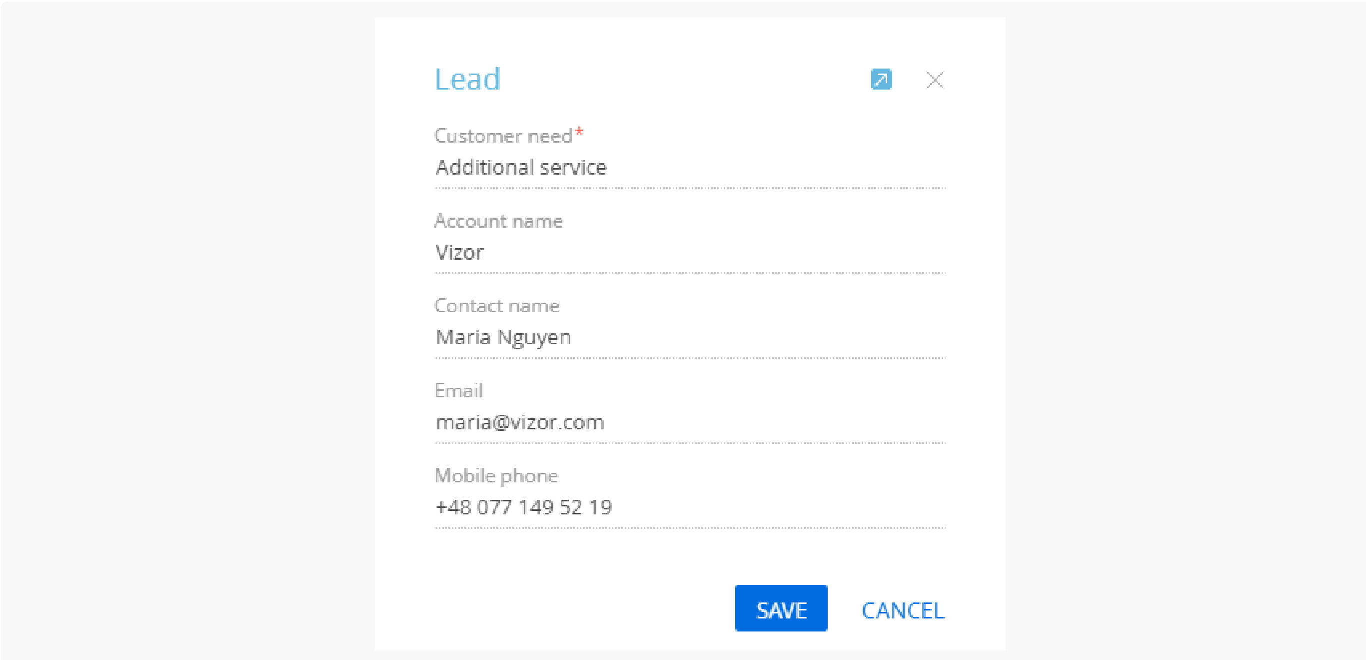
Using the Leads section, you can manage the lead nurturing process from the moment a potential customer expresses an interest in your products up to the handoff to sales.

To add a lead manually:

1. Go to the [*Leads*] section.
2. Click the [*New Lead*] button.
3. Fill out the displayed mini page:
    a. [*Customer need*] field. The field is required.
    b. [*Account name*] field.
    c. [*Contact name*] field.
    d. [*Email*].
    e. [*Mobile phone*] field.

    The fields of the record can be populated later.
4. Click the [*Save*] button to save the new folder (Fig. 1).

Fig. 1 Lead management process



As a result, a new record will be added to the [*Leads*] section.

Lead management process

PRODUCTS: MARKETING SALES CREATIO

Use the best practices and increase your chances to hand-off the lead to sales by following the **lead management process** steps.

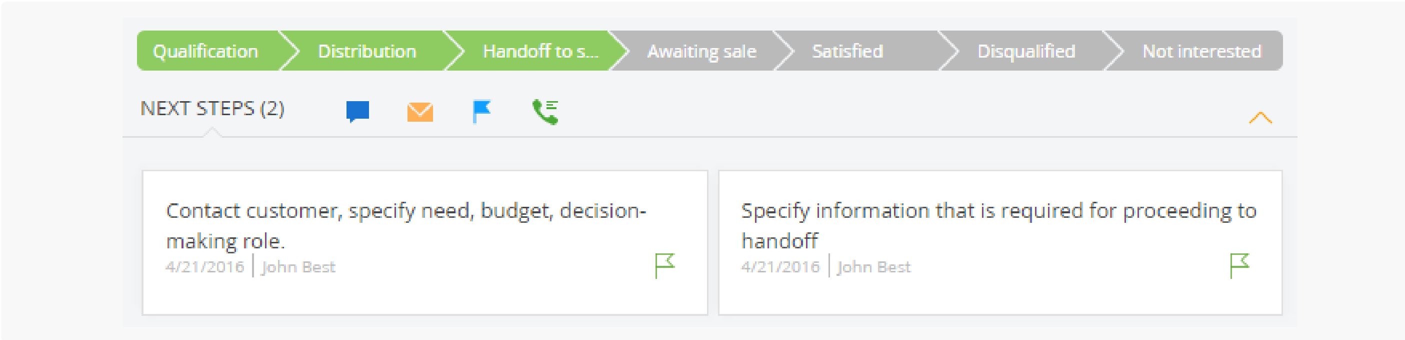
Lead management implies handling a lead by stages, starting with qualification. This may lead to creating activities and opening additional pages in Creatio. As these activities are completed, their results influence the process flow.

Process specifics:

- If the lead management business process is active, Creatio automatically adds linked activities and suggests steps that the user should take on each stage of lead processing.
- Use the **workflow bar** and **action panel** at the top of the lead page (Fig. 1) to manage a lead stages.
- With the workflow bar, you can switch to any stage, skip a stage or return to any previous one.
- Using the action panel, you can manage activities created when managing a lead.
- Customer need details, lead management history and other information are available on the tab dashboard.
- Check tips for each stage by hovering the cursor over the icon.

You can view detailed information on the process steps in the process library.

Fig. 1 The lead management process



To run the lead management process, click the [*Qualify*] button, which is displayed in the list when selecting a lead record or on the new lead page.

Qualification

The qualification stage is used to check completeness of information about a contact or an account to which the lead is linked. This stage starts after the lead information has been saved.

- If the available information is sufficient for further work on the lead, qualify the lead without opening the record page. To do this, select the record in the list and click [*Qualify*].
- If information about a contact or account needs to be checked and updated, select a lead in the record list, click [*Open*], and populate the information blocks – contact and account profiles. You can add a new contact and account or select existing ones. For example, update the record information by adding a mobile phone or website address. After checking and entering the required data on the qualification page, click [*Qualify*].

  If you enter a contact or account in the [*Lead Info*] tab on the [*Qualification*] stage, Creatio will automatically create a new contact or account record.
- If the lead information is insufficient to contact the customer, disqualify the lead by clicking [*Actions*] → [*Disqualify*] → [*Incorrect data*].

Nurturing

On this stage, the owner and the nurturing strategy are determined. Since the owner is appointed at the qualification stage, after qualification, the lead is transferred to the “Handoff to sales” stage, and the "Nurturing" stage is skipped.

If necessary, you can return to this stage and specify the employees responsible for the handoff to sales, and determine the further strategy of working with the lead. To move to the nurturing stage, click [*Nurturing*] on the workflow bar at the top of the lead page. When a lead is being transferred to this stage, the “Lead management: Distribution” page is created in the action panel. Click [*Execute*] and go to the lead distribution page.

- If the customer's interest is confirmed, advance the lead to the next stage to specify the need. To do this, in the [*Distribute*] button menu select the [*Start proceeding to handoff*] command. As a result, the lead proceeds to the “Handoff to sales” stage. If the [*Remind owner*] checkbox is selected on the distribution page, a notification will be sent to the user responsible for proceeding the lead to handoff.
- If there is no point in communicating at the moment, but the customer has a postponed interest, select the [*Continue nurturing*] command in the [*Distribute*] button menu. As a result, the lead remains at the nurturing stage, and you can continue working on it later.

- If the customer is no longer interested in your products or services, select the [*Not interested*] result. The lead will advance to the “Not interested” stage.

Proceed to handoff

The lead is transferred to this stage automatically after the qualification. Contact the customer and find out more about the potential opportunity. After estimating the customer's potential, you can hand the customer over to a particular sales manager taking into consideration the manager qualification and profile. As a result, you can run the handoff or proceed to order for this customer. If the customer has a postponed interest, you can return the lead to the previous stage and carry on nurturing them.

Specify the lead's parameters

On this stage, Creatio will create a task titled ”Contact the customer and specify the availability and actuality of the need, budget, parameters as well as their role in decision-making,” available on the workflow bar.

Execute the task by clicking the title or the [*Complete*] button.

After you complete the task on the [*General information*] tab of the task page, select the required result and click [*Save*].

The process depends on the activity results. For example, if you use Sales Creatio, commerce edition, or Sales Creatio, enterprise edition, and the customer is ready to make an order, specify the task result as “**Proceed to order**.” On the lead page, the “**Sales-ready**” need maturity will be set.

Handoff to sales

If you are ready for handoff, select the “**Proceed to handoff**” task result. Creatio will ask you to enter additional notes for the handoff. After that, a new task will be created to enter information required to hand-off the lead to sales.

While executing it, populate the following fields on the task page:

1. [*Budget, base currency*] – specify expected opportunity budget in the base currency.
2. [*Sales division*] – division that will handle the opportunity, for example, direct sales department or affiliate sales department.
3. [*Meeting date and time*] – specify date and time of the first meeting with the customer.
4. [*Decision date*] – date and time when the customer is ready to make a decision about the opportunity.

   The [*Need type*], [*Assignee*], and [*Notes*] will populated automatically. Information specified in the [*Result details*] field of the lead proceed to handoff page will be displayed in the [*Notes*] field. Once the page is saved, you can see the specified note in the lead feed.

   The data entered will be displayed in the [*Proceed to handoff*] field group on the [*History*] tab of the lead page. You can edit it later.

   Once the page is saved, the note about the handoff will be added to the lead feed. The lead then proceeds to the “Awaiting sale” stage. On the lead page, the “**Sales-ready**” need maturity will be set.

Back to distribution

If the customer is not interested at the moment, but communication with the customer is still available and the possibility to close the opportunity still exists, complete the task and select “**Back to distribution**” in the [*Select results*] field of the task completion mini page. In this case, the lead will return to the “Nurturing” stage, and the “Discovered” need maturity is set on the lead page.

Postpone lead processing

If you need to postpone the task for some defined period, complete it and select “**Rescheduled**” in the [*Select results*] field of the task completion mini page. The lead will remain at the “Handoff to sales” stage. A new task for proceeding lead to handoff will be created.

If the customer need is not confirmed, complete the task and select the “**Not interested**” in the [*Select results*] field of the task completion mini page. In this case, the “Not interested” need maturity will be set on the lead page. The lead will remain at the “Handoff to sales” stage. Later on, after the customer's need is renewed, you can continue working according to the process.

Awaiting sale

All lead management stages are complete. If you use Sales Creatio, team edition, or Sales Creatio, enterprise edition, Creatio will add an [*Opportunities*] section record based on the lead. Corporate sale process will start for the new opportunity. If the corporate sales process is completed successfully, the lead will then proceed to the final “**Need satisfied**” stage.

Lead duplicate search

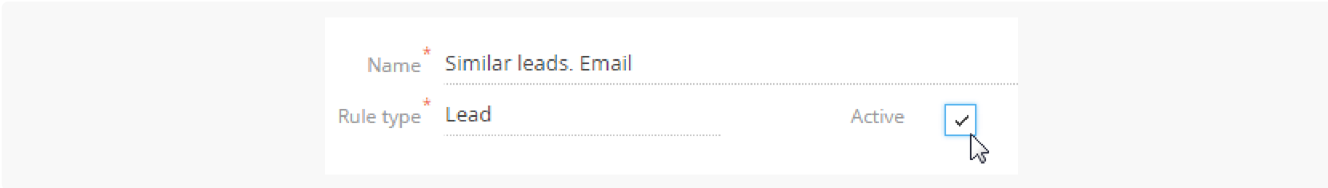
PRODUCTS: MARKETING SALES CREATIO

The lead duplicate search helps to obtain information about customers with similar needs and to eliminate duplicate leads. In contrast to searching for duplicate contacts and accounts, the duplicate search is not started manually. The results of the lead duplicate search are displayed automatically on the [*Similar leads*] detail of the lead page. Duplicates cannot be merged since several similar needs may arise from one customer.

The lead duplicate search in Creatio is performed according to the pre-configured rules for searching for duplicates grouped as “Similar leads”. To enable or disable individual rules:

1. Click to open the System Designer.
2. Open the [*Setup duplicates rules*] link.
3. In the section [*Filter*] menu, select the [*Show folders*] command.
4. In the list of folders, select the "Similar leads" folder. The list will display the pre-configured duplicate search rules.
5. Select a rule from the list and click the [*Open*] button.
6. On the rule page:
    a. Clear the [*Active*] checkbox to disable the rule.
    b. Select the [*Active*] checkbox to enable the rule (Fig. 1).

Fig. 1 Activating lead duplicate search rules



7. Click [*Save*].

   The lead duplicate search will be performed based on the rules with the selected [*Active*] checkbox.

Predictive scoring of leads

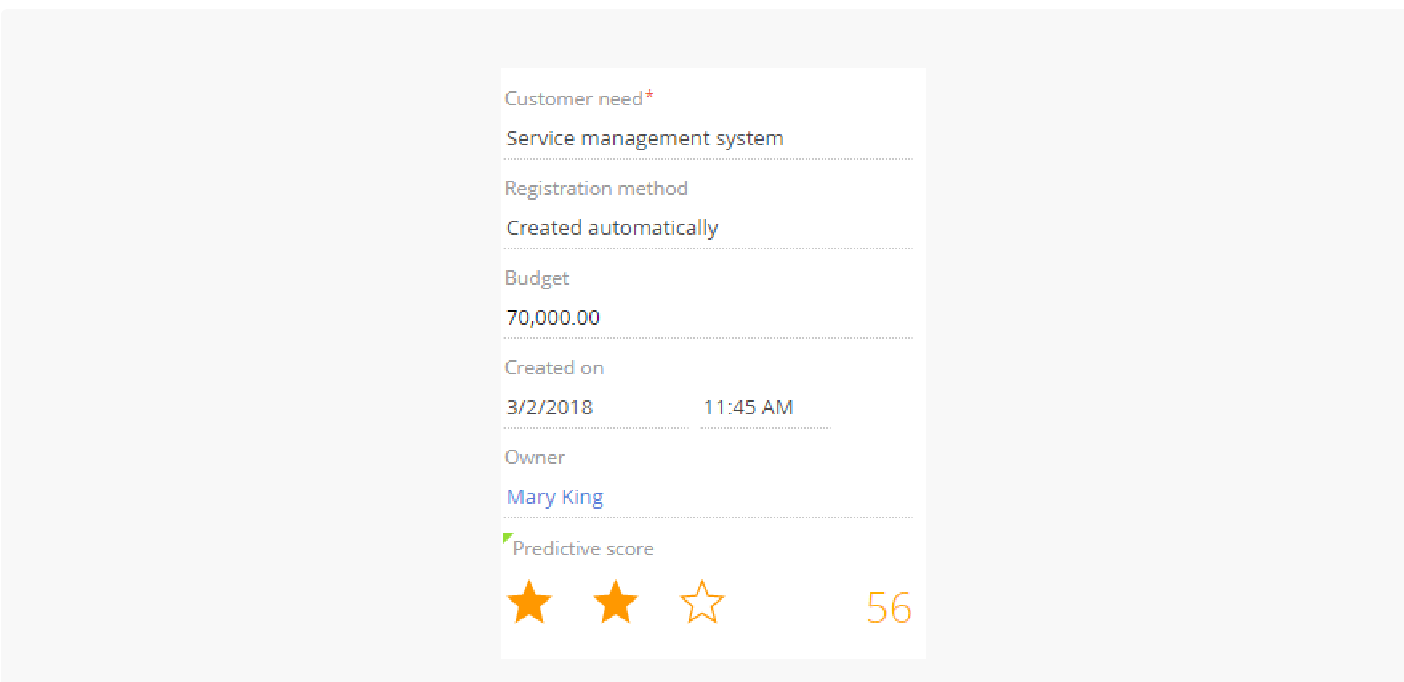
PRODUCTS: MARKETING SALES CREATIO

Lead predictive scoring enables minimizing the amount of working time that your managers spend on low potential leads and increasing the number of leads converted to opportunities. The prediction is performed for every qualified lead. It takes into account the lead parameters and the working history.

Predictive score – a [machine learning](#) tool that displays the probability of lead conversion to a new opportunity on a scale from 1 to 100 points ([Fig. 1](#)).

> **Note.** In case the predictive score is not displayed in the lead profile, you need to verify if lead predictive scoring is enabled and a trained model instance exists in the [*ML models*] section of Creatio.

Fig. 1 Lead profile with a predictive score



Depending on the probability of lead conversion to opportunity Creatio determines general likelihood of lead conversion:

- – high predictive score (80-100 points)
- – medium predictive score (50-79 points)
- – low predictive score (1-49 points)

Predictive scoring is not performed for non-qualified leads and the predictive score for such leads is set to "0" .

The predictive score is regularly recalculated since lead nurturing process is having a constant impact upon the probability of its conversion to opportunity. The score can either be raised or decreased if the lead information has not been updated for a long time. Learn more about predictive scoring in the "Predictive scoring" article.

Launch of predictive scoring

You can launch lead predictive scoring for a single record as well as for all the lead records being nurtured. You can launch it automatically or manually for a selected record.

Set up automatic predictive scoring

Predictive scoring is initiated **automatically**:

- During lead qualification. In this case the score prediction is only performed for the qualified lead.
- Every day, when Creatio is not excessively used. In this case the score prediction is performed for all the leads being nurtured.

To set up the automatic launch of the predictive scoring process for all nurtured leads:

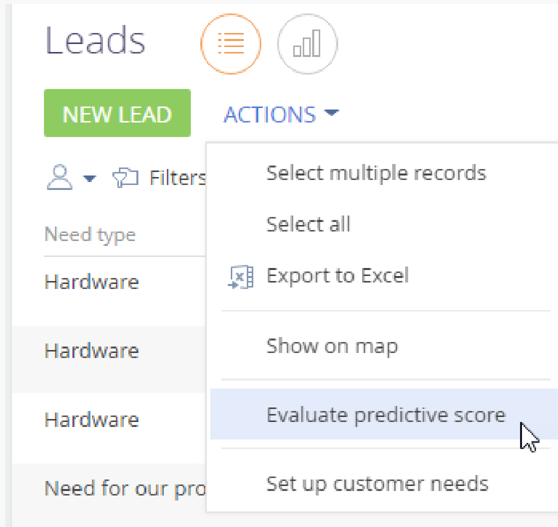
1. Click to open the System Designer.
2. Click [*ML models*] in the "System setup" block.
3. Open the lead scoring page.
4. Navigate to the [*Setting up background update of prediction results*] detail on the [*Parameters*] tab and switch the [*Perform background update of prediction results daily during the maintenance window*] slider to the right.

> **Note.** You can set up the period when Creatio is least loaded (to run resource-heavy processes) in the [*Maintenance periods*] lookup.

Launch predictive scoring manually

To **manually** launch predictive scoring for any lead, highlight the record whose score needs to be displayed in the [*Leads*] section, and select the [*Evaluate predictive score*] command from the [*Actions*] menu (Fig. 1).

Fig. 1 Manually launching lead predictive scoring



Data processed during predictive scoring calculation

To evaluate the lead predictive scoring, the machine-learning model analyses the data of the lead and its linked records. We recommend populating Creatio with maximum information about the lead for its processing during the predictive scoring.

During the scoring process, the machine-learning model processes the following data of the lead and the connected objects.

- Lead need type.
- Availability of a qualified contact and contact details (role, type, department, job title, mobile phone, business phone).
- If there are no contact details on the lead page, Creatio verifies if these details are populated on the corresponding contact page.
- Availability of a qualified account and account details (category, industry, type, number of employees, web site, country).
- If there are no account details on the lead page, Creatio verifies if these details are populated on the corresponding account page.
- Lead engagement data (source, channel, website events, landing).
- - Lead aggregated indicators:
  - number of days after lead qualification
  - number of leads per contact
  - number of leads per contact registered within the last 2 weeks
  - number of phone calls and emails per lead (monthly, quarterly, total)
  - number of days after the last phone call
  - number of days after the last email

Lack of one or several parameters from the list might have considerable impact upon the lead predictive score accuracy.

Leads FAQ

PRODUCTS: MARKETING SALES CREATIO

How to assign the owner of a lead?

Lead distribution includes the assignment of the lead owner, need clarification and the decision to nurture further or proceed to handoff.

This step is optional and may be performed at any lead stage, except the final stages (“Awaiting sale” and “Satisfied”).

As the owner assignment is not a mandatory action, after the qualification stage is complete the lead is transferred to the “Handoff to sales” stage. To assign an owner, you need to return to lead distribution by clicking the lead distribution stage on the workflow bar (located at the top of the lead page), or go to the [*History*] tab and specify the owner on the [*Lead distribution*] detail.

What is the purpose of “Continue nurturing”?

The decision to hand off a lead to sales or to continue the nurturing is made based on whether there is sufficient information to start the sale and whether the customer is ready for a deal. If the customer is not interested at the moment, but communication is still available and the possibility to close the opportunity exists, select the “Back to nurturing” task completion result.

During the nurturing, you can determine the further strategy of working with the lead: to clarify the customer need or to specify missing data.

As a result, the lead remains at the distribution stage, and you can continue working on it later. Otherwise, you'd have to select the "Not interested" stage and such a lead would become unavailable for further work.

What is the difference between the lead source and lead channel?

Lead channels are resources involved to attract leads, for example, search engines, email, social networks, media resources, etc. A lead source is a specific resource from which a lead is transferred into Creatio, for example, the Google search engine, email, Facebook, etc.

What is the difference between the [Account] and [Account name] fields on the lead page?

The account information can be found in two places:

- On the [*Registration info*] detail of the [*Lead info*] tab. The fields on the details are populated automatically when you add a new lead to Creatio and only with the data that the user provided during registration on the landing page. If a user has not entered the company name on the landing page, then the [*Account*] field on the [*Registration information*] detail will be blank.
- The account profile is located on the left side of the lead page. This interface enables you to register a new

company or to associate an existing account with the lead based on registration data from the [*Initial data*] tab. If a user has specified the company name registered in the [*Accounts*] section, Creatio will pull in the profile information for the account and enable you to associate it with the lead.

What is the logic of automatic contact creation?

A contact is added automatically when creating a new lead via landing page if the [*Create contact*] checkbox is enabled.

When adding a new lead manually:

- If the lead is added for an existing contact, this contact will be specified in the corresponding profile on the lead page and you can connect the lead and contact records via the [*Select from similar*] option.
- If the contact specified in the lead mini page does not exist, it will be added automatically after clicking the [*Qualify*] button.

What data from the lead page are passed to the contact page?

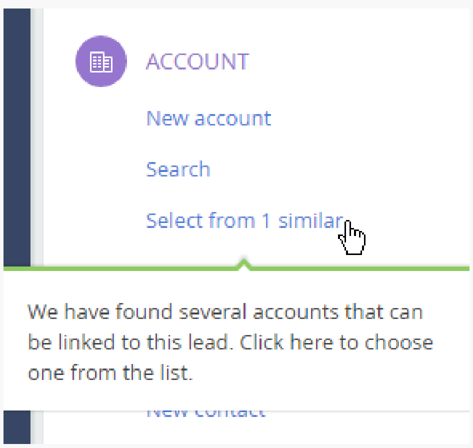
When a contact is created automatically, all basic information about the contact (name, communication options) is passed to the contact page from the lead page.

How does the contact and account search work when qualifying a lead?

The [*Name*] and [*Company*] fields are standard fields in the web form on the landing page. Information from these fields will be used to populate the [*Contact name*] and [*Account name*] fields on the [*Lead info*] tab.

Contact and account profiles are located in the left part of the lead page. These blocks contain general information about contact and account connected with the lead. If a contact or account are similar to the existing ones, the existing contact or account can be connected with the lead page via the [*Select from similar*] option. (Fig. 1):

Fig. 1 Connect lead to account



Conditions that enable selecting from similar contacts and accounts are described below.

Similar contact:

- Values of the [*Contact name*] and [*Email*] fields on the lead page are equal to the [*Contact name*] and [*Email*] fields on the contact page.
- Values of the [*Contact name*] and [*Mobile phone*] fields on the lead page are equal to the [*Contact name*] and [*Mobile phone*] fields on the contact page.

Similar account:

- Value of the [*Account name*] field on the lead page is equal to the [*Account name*] field on the account page.
- Values of the [*Account name*] and [*Country*] fields on the lead page are equal to the [*Account name*] and [*Country*] fields on the account page.

How to start the lead management process?

By qualifying the lead, you begin to work on the process. The lead management business process starts automatically after clicking the [*Qualify*] button and continues running as you work with a lead.

You can also customize the lead management business process according to your needs. To do this, create a new business process or copy an existing one and change it accordingly. Specify the name of the new process in the “Lead management business process” system setting. The details of the business process features are described process setup documentation.

How to disable a base sub-process?

To disable a base sub-process, copy an existing business process and give it a new name. Disable the required sub-process and specify the name of the new process in the “Lead management business process” system setting More ways of configuring and working with business processes are described in the process setup documentation.

How to change the standard lead management process? How do I add or modify process stages?

You can delete, change or add process stages, and change the list of activities in accordance with your needs.

To change the set of stages and transitions between them use the [*Lead stage*] and [*Available transitions between lead stages*] lookups.

To change the list of basic activities, which are created during the process execution, you need to replace the default process with a custom copy.

To do this:

1. Open the [*Process library*] section.
2. Find the default process that you want to change. The lead management process consists of several sub-processes, each referring to a particular stage. When searching for a subprocess, mind the name and the prefix. For example, if you need to change the “Qualification” stage of the lead management process in Financial Services Creatio, sales edition, look for a process called “Lead qualification v7.8.0(lead finance).”

3. Create a copy of the base lead management process by clicking the [*Copy*] button record in the process record.
4. Make the required changes in the copy. You can change the elements, remove elements or add new ones.
5. Save the edited copy and publish.
6. Specify the name of modified copy in the [*Value by default*] field of the “Lead management business process” system setting.
7. Go to the original version of the corporate sales process and disable it by clicking the [*Actions*] → [*Disable*].

   Detailed descriptions of business process management are available in the Creatio business process documentation.

   After performing the settings, the system will use the custom lead management process.

How to search for duplicates?

The lead duplicate search helps to obtain information about customers with similar needs. You can delete duplicate leads manually, if needed. Leads that look like duplicates will be displayed on the [*Similar leads*] detail. Learn more in a separate article: Lead duplicate search.

How is the [Extended lead information] detail populated?

Creatio populates the detail automatically when LinkedIn integration is set up. The detail is populated using data of ad campaign, ad banner, and lead generation form that are connected to the lead.