

## Power Cozmo Lead Design outlines

Unfortunately Meraj did not follow my files and instructions in the design of our CRM so I am making this file to consider point which is not covered by him.

Here's a comprehensive description of the key features and functionalities that development team should consider in designing and implementation of our Lead Center

### Future works Ai Tools:

1. We are working in a tool which will fetch inquiries (Lead) from different web sources and this tool will send leads to RFQ\Leads management center in admin panel, then from our admin panel the leads will be distributed to our registered seller.
2. Also we will apply Lead Generation tool, this tool have access of billion shipment data which contains sellers & buyer name and addresses, so we can make \suggest leads to our seller through this tool
3. Our Visitors will be tracked through reverse IP lookup and if our system find the contact it will be sent to seller in lead center

### 1. Lead Classification and Grouping:

Implement a robust lead classification system that allows users to categorize leads based on their status and interest level. Some common lead classifications include:

- **Untouched:** any none classified lead, none read lead.
- **Qualified:** Leads that meet specific criteria and are ready for sales engagement.
- **Non-Qualified:** Leads that do not meet the necessary requirements for immediate engagement.
- **Nurturing Leads:** Leads that require further engagement and nurturing to become qualified.
- **Spam:** Leads identified as irrelevant or generated through unsolicited means.
- **Blocked:** Leads from specific sources or individuals that are blocked from further engagement.
- **Not Interested:** Leads that have explicitly stated they are not interested in your offerings.

### 2. Qualification Criteria Section:

In this section, the sales representative will evaluate the lead based on specific criteria to determine its potential. Criteria may include, and user can customize:

- **Budget:** A checkbox or dropdown to indicate if the lead has a budget for the product/service. (High Budget - Medium Budget - Low Budget - Not Sure / Not Disclosed)
- **Authority:** A checkbox or dropdown to assess if the lead has the authority to make purchasing decisions.( Decision Maker – Influencer – Gatekeeper - Not Sure / Not Disclosed)

- **Need:** A field or dropdown to gauge the lead's need for the product/service. (Urgent Need - High Need - Medium Need - Low Need - No Need Identified)
- **Timeline:** A field or dropdown to capture the lead's timeframe for making a decision.( Ready to Purchase - Within 1 Month - Within 3 Months - Within 6 Months - Longer than 6 Months - Not Sure / Not Disclosed)
- **Fit:** A checkbox or dropdown to evaluate if the lead aligns with the target customer profile.( - Perfect Fit - Good Fit - Partial Fit - Not a Fit)

### 3. Lead Tagging:

Allow users to add customizable tags to leads for better organization and filtering. Some example tags for B2B sales CRM could include: **User can make any tags based on any value can be measured in system,**

- **Industry:** Tags representing the industries the leads belong to (e.g., Power, Oil & gas, water. Etc ).
- **Product Interest:** Tags indicating the specific products or services the leads have shown interest in.
- **Lead Source:** Tags identifying the source through which the lead was acquired (e.g., website, trade show, referral, by power Cozmo sources).

### 4. Reminders, Notes, and Tags:

Integrate features for setting reminders, adding notes, and attaching tags to individual leads. This empowers sales representatives to keep track of important follow-ups, record crucial information, and organize leads more efficiently.

### 5. Converting Leads to Contacts and Accounts:

Define clear criteria for converting leads to contacts and accounts in the CRM. The process should include the following steps:

- **Lead to Contact:** When a lead has met the qualification criteria in section 2 and expressed genuine interest, it can be converted into a contact. The lead's information should seamlessly transfer to the contact profile.
- **Lead to Account:** If the lead represents a company or an organization, it can be converted into an account, with associated contacts linked to that account. This allows for a comprehensive view of all interactions with that organization.

### 6. Lead scoring

Lead Scoring is an essential feature in a B2B sales CRM that helps prioritize leads based on their potential to convert into customers. It quantifies and ranks leads according to their engagement level and qualification. Here's an extension of the features to include lead scoring:

Implement a lead scoring system that assigns a numerical value to each lead based on various factors, such as:

- A. **Engagement Level:** Monitor the lead's interactions with our B2B platform, including website visits, email opens, link clicks, and social media engagements. Assign higher scores to leads that frequently engage with content, as it indicates a higher level of interest.
- B. **Demographic Data:** Consider lead attributes like job title, company size, industry, and location. Leads that match ideal customer profile should receive higher scores.
- C. **Behavioral Data:** Analyze specific actions taken by leads, such as downloading resources, attending webinars, or UTM data . Such activities show intent and should increase a lead's score.
- D. **Lead Source:** Assign different scores to leads based on the channel through which they were acquired. For example, leads generated from a targeted marketing campaign may receive higher scores than those from general inquiries.
- E. **Lead Qualification Criteria:** Integrate the custom lead qualification criteria (mentioned in the initial description) into the lead scoring algorithm. Leads that meet specific qualification criteria should have their scores adjusted accordingly.
- F. **Time Decay:** Implement time decay in the lead scoring model to account for the recency of lead engagement. Leads that have shown recent interest may be more likely to convert, so their scores should reflect this.
- G. **Negative Scoring:** Consider implementing negative scoring to penalize leads for certain behaviors that indicate a lack of interest or incompatibility. For example, leads marked as "Spam" or "Not Interested" may receive negative scores.
- H. **Thresholds and Automation:** Set score thresholds to identify leads that are "Sales Qualified" or ready for further nurturing. Automate lead assignments and notifications based on these thresholds, ensuring the right leads are passed to sales representatives at the appropriate time.
- I. **Scoring Visualization and Reporting:** Provide sales teams with intuitive visualizations and reports that showcase lead scores, helping them understand lead quality at a glance. This empowers sales reps to prioritize their efforts and focus on the most promising leads.

**Buying Signals:** Tagging with hot leads, warm leads, cold leads

Buying signals are behavioral cues or actions exhibited by leads or prospects that indicate their interest, intent, or readiness to make a purchase. Recognizing and interpreting buying signals is crucial for sales and marketing teams, as it helps identify warm leads and potential opportunities for conversion. These signals can be both implicit (actions that indicate interest without direct expression) and explicit (overt expressions of interest). Identifying buying signals allows sales reps to focus their efforts on leads who are more likely to convert, increasing overall sales efficiency.

**Examples of Buying Signals:**

Website Interactions: Actions such as repeated visits to product or pricing pages, downloading product brochures, or using live chat support.

- **Email Engagement:** Opening emails, clicking on links, or responding to email campaigns can indicate interest.
- **Content Consumption:** Regularly engaging with blog posts, whitepapers, webinars, or videos related to your products or industry.
- **Social Media Interactions:** Liking, commenting, sharing, or direct messaging your brand's social media content.

- **Form Submissions:** Filling out contact or inquiry forms on your website or landing pages.
- **Demo or Free Trial Requests:** Expressing interest in trying out your product through demo requests or signing up for a free trial.
- **Event Attendance:** Registering for webinars, workshops, or industry events hosted by company.

Applying Buying Signals in CRM and Related Scoring:

- A. **Data Collection and Integration:** To apply buying signals in CRM, we need to collect data from various channels (website, email, social media, etc.) and integrate it into our CRM system.
- B. **Define Buying Signal Actions:** Determine which actions or interactions qualify as buying signals. We will Create a list of these actions and behaviors, ranking them based on their importance and relevance to sales process.
- C. **Lead Scoring:** Implement lead scoring in our CRM to assign values or scores to leads based on their engagement with buying signals. The more relevant and frequent the signals, the higher the lead score should be. For example:
  - I. **UTM Data** (each will have different point)
  - II. **Opening an email:** +5 points
  - III. **Clicking on a link in an email:** +10 points
  - IV. **Downloading a product brochure:** +15 points
  - V. **Requesting a demo:** +20 points

**Thresholds and Lead Prioritization:** Set scoring thresholds to categorize leads into different segments based on their scores (e.g., hot leads, warm leads, cold leads). Prioritize outreach efforts on leads with higher scores, as they are more likely to be ready for sales engagement.

**Automated Workflows:** Set up automated workflows in CRM to trigger follow-up actions based on buying signals. For example, if a lead downloads a specific whitepaper, the CRM can automatically send them a related case study or invite them to a relevant webinar.

**Monitoring and Analysis:** Continuously monitor and analyze buying signals and their impact on conversion rates. Use this data to refine lead scoring model and improve the effectiveness of sales and marketing strategies.

By effectively applying buying signals in CRM and lead scoring, sales team can focus on leads that are displaying genuine interest in products or services, leading to more successful conversions and a more efficient sales process.