Leads Management Tools on Power Cozmo CRM

Introduction

Power Cozmo is a B2B platform specializing in energy, power, water, oil & gas industries. It features built in CRM with modules like Lead Center, Quote, Invoice, and Order. Within the Lead Center, leads are categorized as Untouched, Nurturing, Qualified, Unqualified, Recycled, Customer, Spam/Blocked/Deleted, and Not Interested/No Category. Categorization and actions can be manually or automatic by rules and workflow automation based on criterion.

Lead Types in Power Cozmo

1. **Direct Leads:** These are leads who initiate contact with a seller directly, through channels like Get Quote, Contact supplier, Live chat, email. They are considered the most qualified leads as they express immediate interest.

2. **Power Cozmo Leads:** These are leads (generated & collected) by the Power Cozmo Lead Distribution Center (LDC) and distributed to multiple sellers (typically 3, 4, or 5) based on pre-defined rules or targeted campaigns. While potentially less qualified than direct leads, they represent valuable sales opportunities to our premium Subscribers. (All leads sent by buyers will be copied in LDC and our system will resend them to other sellers based on (seller subscription, score, etc)

3. **Potential Leads:** These are identified by Power Cozmo based on visitor behaviour, indicating potential interest in specific products, sellers, or searches. They can be further categorized as:

    - **Unknown Users:** Visitors without an account, whose information is inferred through IP address and reverse IP identification. These leads require additional nurturing and qualification due to limited information. Check section in this file Buyer Engagement & IP Tracking

    - **Known Buyers:** Existing account holders on our website who exhibit high engagement with specific products or sellers. These leads are considered pre-qualified and offer promising conversion potential.

Data linking of Buyers & IP Tracking

Known Buyers (With Accounts)

- **Data Linking:** Core engagement data (page views, purchases, etc.) is directly tied to the buyer's account.
- **IP Tracking (Supplementary):** Track IP addresses associated with buyer sessions. Use this if multiple buyers might use the same account, or to get some location data before they log in.

Unknown Buyers (No Account Yet), IP Tracking: IP addresses are our primary initial data point.

- **Geolocation:** Use IP lookup services to get an approximate location (country, region).
- **Company Identification:** We have to Consider 3rd party services that attempt to link IP addresses to businesses (varying levels of accuracy).
- **Progressive Profiling:** As the lead interacts (fills out forms, etc.), gradually gather more information to build their account profile.

Code & Technical Considerations

- **IP Lookup Service:** Munnaver and Parminder please Choose a reliable service (many exist, paid ones often have better accuracy). Some suggestions Listed below
- **Data Storage:** Design database to accommodate:
  - **Known buyers:** Link data directly to their account ID.
  - **Unknown buyers:** Initially store data linked to the IP address, with the ability to merge it into an account profile once they create one.
- **Session Tracking:** Use cookies or backend session logic to tie a series of actions to the same IP address during a browsing session.

Popular IP Lookup Services

1. https://www.visitorqueue.com/
2. https://www.transunion.com/solution/trulookup/investigate-alert/business-search
3. **MaxMind GeoIP2:** Mature provider with free and paid database options. Good accuracy, though paid tiers offer better precision.
4. **IPinfo.io:** Highly reliable API-based service. Offers a range of data points beyond location, including company association, carrier detection, privacy information.
5. **Clearbit:** Specializes in company identification and enrichment. Can augment lead profiles with company size, industry.

6. **IP Stack:** Easy-to-use API offers a free tier for basic geolocation lookups.
7. **AbstractAPI:** Suite of APIs including geolocation and company information. Flexible pricing options.

Initial Data Collection for Lead Capture

- For Registered buyer make sure to reflect the Entered information in buyer profile to lead information in CRM.
- For None registered buyer, we will try to collect the below basic information, through web forms, chat, IP Address lookup.

Table of Basic Lead Data we must collect.

Data Point	Details	Purpose
Name	Full name of the lead (first and last name).	Essential for personalizing communication and identifying the lead.
Contact Details	**Primary Email Address:** The lead's main email for communication. **Phone Number:** A direct contact number for calls or SMS.	Important for establishing direct communication channels with the lead.
Company Information	**Company Name:** The name of the company where the lead is employed or owns. **Industry:** The sector or industry in which the company operates. **Company Size:** Number of employees or revenue size (if relevant).	Helps in segmenting leads and understanding the business context.
Role/Position	**Job Title:** The lead's official title or position within their company. Department: The department or division they work.	Provides insight into the lead's decision-making capacity and relevance to seller offerings.
Source of Lead Check below section	**Acquisition Channel:** How the lead was acquired (e.g., website form, trade show, referral). **Initial Point of Contact:** The first point of interaction (e.g., specific landing page, referral name).	Crucial for tracking the effectiveness of different lead generation channels and strategies.

4. Defining lead sources

Designing an effective lead capture and initial data collection system involves identifying all potential sources where leads can be generated. Hear is a table list capturing leads across all touchpoints. **In our CRM Consider Auto Lead source tagging and Manual Tagging by seller for offline channels.**

Lead Source Table

Lead Source Category	Lead Source	Description	Tooltip for user
Online Channels	Web Forms	Forms on website for user engagement.	Capture leads through contact forms, sign-ups, and downloads.
	Landing Pages	Targeted pages for specific campaigns.	Pages designed for marketing campaigns to capture leads.
	Online Ads	Leads from digital advertising.	Leads generated through online advertising campaigns.
	Social media	Interactions on social platforms.	Leads from social media engagements and direct messages.
	Email Campaigns	Responses to email marketing.	Capture leads who respond to your email marketing efforts.
	Webinars	Online event sign-ups.	Registrants for webinars and virtual events.
	Content Marketing	Leads via SEO and blogs.	Leads attracted through your optimized content and blogs.
Platform-Specific Channels	Get Quote Form	Requests for product quotes.	Leads generated through 'Get Quote' requests on your platform.
	Contact Seller Form	Direct inquiries to sellers.	Potential clients who use the 'Contact Seller' form.
	Power Cozmo Leads	Leads provided by Power Cozmo.	Leads directly sent by Power Cozmo to sellers on the platform.
Offline Channels Manually Defined by seller	Events	Attendee details from events.	Leads collected at trade shows, conferences, and events.
	Networking	Contacts from networking.	Leads obtained through business networking events.
	Direct Outreach	Cold calls and mail responses.	Leads generated from traditional marketing methods.
	Referrals	Recommended by others.	Leads referred by existing customers or partners.
	Print Media	Print ad responses.	Responses from print advertisements.
	Business Cards	Collected cards.	Contacts from exchanged business cards.
Partnerships Manually Defined by seller	Partners	Affiliate recommendations.	Leads referred by business partners or affiliates.
	Collaborations	Joint venture leads.	Leads from collaborations with industry partners.
Third-Party Sources	Lists	Purchased lead lists.	Leads acquired from third-party providers.

Lead Source Category	Lead Source	Description	Tooltip for user
Manually Defined by seller	Lead Services	External generation services.	Leads sourced through specialized lead generation services.
Other Sources	Customer Referrals	From existing customers.	Leads referred by your current customer base.
Manually Defined by seller	Community Engagement	Community-related leads.	Leads from community events and sponsorships.

Questioner Tool:

To gather more information, a questionnaire tool is used:

1. When a buyer sends an RFQ, it lands in the Untouched group. The system assesses data and sends a questionnaire to the buyer's email.
2. The questionnaire consists of **two parts**: **general information** (personal, company, champ/bant) and **specific data needed for a quote**.
3. A real-time scoring system evaluates the provided information and engagement level, automatically transferring leads between groups.
4. For previous clients or contacts, the questionnaire focuses only on **missing data**.

Leads Grouping and classification.

Lead Group	Description	Tooltip for User
Untouched	Newly acquired leads that have not been engaged with yet.	These leads are brand new and haven't been contacted yet.
Nurturing	Holds leads needing further engagement before qualification. Prioritize by engagement score. Sub-categorize or tagged based on interests/needs for targeted nurturing.	These leads show potential but need more information or interaction to determine their fit.
Qualified	holds leads meeting predefined criteria for potential conversion. Ready for sales outreach.	These leads are a good match for your offerings and are ready to be contacted by a salesperson.
Unqualified	Contains leads not meeting essential criteria for conversion. Consider recycling after a period.	These leads are not a good fit at this time, but they might be in the future.
Recycled	Holds previously unqualified leads that might become viable later. Set time-based triggers to move leads here after inactivity.	These leads were previously not a good fit, but they're worth revisiting in case their needs have changed.

Lead Group	Description	Tooltip for User
Customer	Stores leads converted to customers or accounts. Track post-sale engagement, satisfaction, and upsell/cross-sell opportunities. **Also, this group will solve the presenting issue of new leads came through previously qualified leads.**	These leads have already become customers or converted to contacts or accounts. Stay in touch to keep them happy and see if they need anything else.
Spam/ Blocked/ Deleted	Holds leads marked as spam, blocked due to policy violations, or intentionally deleted.	These leads are not worth pursuing.
Not Interested/No Category	Holds leads explicitly expressing disinterest or lacking clear categorization.	These leads are not interested in your offerings currently.

Lead Management Tools Development, Rules, and workflow Creation.

These tools aim to automate below actions:

- **Lead transfers:** Transferring leads between groups based on criteria, threshold values, and actions.
- **Actions:** Sending emails, trigger SMS, creating tasks like reminder, follow up, assigning leads to sub-accounts, triggering campaign, Create Quote, invoices.
- **Segmentation:** Grouping leads based on defined criteria.
- **Lead Score Calculating.**

To achieve this, we need to define:

1. **Criteria:** Select from the predefined list.
2. **Threshold Value:** Set a specific target for the chosen criteria.
3. **Action:** Choose the action to be taken when the threshold is met.

   Sunset Rules: Include options to expire rules after certain dates or events.

Predefined Criteria groups:

The criteria are categorized into these below sections, **more criteria will be integrated for any new Developed module**.

1. **Group 1: Lead Contact Information:** Email, phone number, etc.

2. **Group 2: Lead Company Information:** Industry, company size, location, Lead source, etc.
3. **Group 3: Lead BANT-Champ Information:** Budget, Authority, Need, Timeframe, challenges, Fit with Product or Service.
4. Group 4- Buyer Engagement with seller:
   - Buyer engagement with seller related pages: Website visits, content consumption, etc
   - Buyer interaction with seller – Communication channel: live chats, emails sent, calls made, etc.
   - Buyer interaction with seller – Clicks and Actions: Image views, Quote request, contact seller, Wishlist, etc.
5. Group 5- Buyer interaction with Power Cozmo Platform:
   - Buyer Engagement with power Cozmo
   - Buyer Interaction with power Cozmo.

Seller Side- Criteria List

Group #1 – Lead Contact information.

Group	Criterion	Data type\ Value unit\option	Operator	Tooltip
G# 1	Lead Contact information			
1	Contacts	Full name of the lead (first and last name).	Exact Match, Contains	Used for personalizing communication. Essential for uniquely identifying the lead.
2	Email Address	The lead's main email for communication.	Exact Match	Crucial for direct communication and marketing outreach. Verified Emails will have more points.
3	Phone Number	A direct contact number for calls or SMS.	Exact Match, Contains	for direct calls or SMS marketing, enhancing lead engagement.
4	Location	Buyer country name, Dropdown (All countries), Selection List.	Exact Match, In List, Not in List	Allows for regional targeting and segmentation.
5	Job Title	Consider pre-defined options and custom fields, Dropdown: CEO, VP, Director, Manager, Engineer, Procurement Specialist, Buyer, etc. (fetch exact list from our system).	Equals, Contains, Does Not Contain	Facilitates role-based targeting, enhancing relevance of communication.
6	Lead Source	Dropdown from predefined list, Table in Page# 4	Exact Match, Contains	Identifies the origin of the lead, useful for tracking the effectiveness of marketing channels.

Group #2 – Lead Company information.

Group	Criterion	Data type\ Value unit\option	Operator	Tooltip
G# 2	Lead Company information			
1	Company Name	The name of the company where the lead is employed	Exact Match	Identifies the lead's company for personalized outreach.
2	Company Size	Dropdown menu Number of employees, fetched from buyer profile or by seller questionnaire. ex, >10, >50, >100, >500.	>, <, Within Range	Useful for segmenting leads based on company scale, affecting solution scalability and pricing discussions.
3	Annual Revenue	Value of annual revenue in global currency, fetched from buyer profile or by seller questionnaire.	>, <, Within Range	Helps gauge the financial capacity and potential budget available for the lead's company.
4	Industry	The sector or industry in which the company operates. At this criteria seller will see list of industries from buyer profile in addition to list added by him in questionnaire. *Dropdown: Power Generation, Renewable Energy Sources, Water Treatment Technologies, Oil & Gas, Manufacturing, etc Consider pre-defined options and custom fields*	Exact Match	Ensures marketing and sales efforts are aligned with the lead's industry-specific needs and challenges."

Group #3 – Lead Bant-Champ information.

Group	Criterion	Data type\ Value unit\option	Operator	Tooltip
G# 3	Lead Bant -Champ information			
1	Budget & Money	Number + Currency Input	Greater Than, Less Than, Within Range	Specify the minimum, maximum, or acceptable range of the lead's budget. Indicates financial capacity and flexibility for the project.
2	Authority	Decision Maker, Influencer, Other (specify)	Exact Match	Indicates the lead's power to make or influence the purchasing decision and identifies the contact's role in the decision-making process.
3	Need	Urgent, Strong, Moderate, Weak	Exact Match	How pressing is the problem the lead is trying to solve? Reflects how critical the solution is to the lead.
4	Timeline	Within 1 Week ,1-3 Months ,3-6 Months ,6+ Months or: Immediate, Short-term, Long-term	Exact Match	How soon does the lead intend to make a purchase?
5	Challenges	Technical (specify), Financial (specify), Operational (specify)	Contains	What obstacles is the lead facing? Consider multiple challenges.
6	Product/Solution Fit	Dropdown of typical client needs	Exact Match	Does the lead's expressed need match what your product or service directly solves?

Group #4 – Lead Engagement with seller.

G# 4A- Buyer engagement with seller related pages

	Criterion	Data type\ Value unit\option	Operator	Tooltip
G# 4A	Buyer engagement with seller related pages			
1	Engagement Level	Percentage (0-100%), Pre-calculate by the system, explained in separate file.	Greater Than, Less Than, Within Range	Overall interaction percentage, calculated from a combination of page views, time on site, content consumption, etc.
2	Seasons Engaged	Number	Greater Than, Less Than, Within Range	
3	Page Viewed	URL, Dropdown of important pages	Exact Match	Specific product page, category page, or other relevant URLs
4	Page Revisits	Number, Track at the page level	Greater Than, Less Than, Within Range	Indicates strong interest in a specific page
5	Time on Page	Seconds or Minutes	Greater Than, Less Than, Within Range	Threshold based on the average length of content
6	Scroll Depth	Percentage (0-100%)	Greater Than, Less Than, Within Range	Did the lead read most of the page?
7	Clicks	Integer	Greater Than, Less Than, Within Range	Demonstrates interaction beyond browsing
8	Element Clicked	Element ID/Class, Dropdown of key elements	Equals	Track clicks on important elements (quote, contact, purchase)
9	Time Untouched	Duration	Greater Than	How long since the lead's last activity?" Track at the action-level

G# 4B- Buyer Interaction with seller- Communication channel

	Criterion	Data type\ Value unit\option	Operator	Tooltip
G# 4B	Buyer interaction with seller – Communication channel			
1	Email Open Rate	Percentage (0-100%)	Greater Than, Less Than, Within Range, Equal To	Percentage of emails sent to the lead that were opened.
2	Chat Response Rate	Percentage (0-100%)	Greater Than, Less Than, Within Range, Equal To	% of chat sessions initiated by the Seller where the Lead responded.
3	Email Response Rate	Percentage (0-100%)	Greater Than, Less Than, Within Range, Equal To	Percentage of emails sent by the seller where the lead replied.
4	Chat with Seller	Started, Completed, Abandoned	Equals, Greater Than	Wants direct communication
5	Contact Seller	Submitted, Failed, Pending	Equals, Within Range	Shows active interest

G# 4C- Buyer engagement with seller Clicks and Actions

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
C1: Purchase Intent				
Quote Request	Status	Submitted, Failed, Pending, Abandoned	Equals, Within Range	Indicates the lead is actively seeking pricing.
Wishlist	Actions	Add, View, Remove	Equals, Greater Than Less Than	Product interest, but maybe not immediate purchase
Order Data	Value, Frequency, Conversion Rate	E.g., $5000, 3/month, 3%	Greater Than, Less Than, Within Range	Strongest indicator of purchase intent
C2: Product Interest & Content				
Product Image Clicks	Boolean	Yes/No	Equals, Greater Than	Lead is interested in visuals
Product Spec Tap View	Boolean	Yes/No	Equals, Greater Than	Lead wants technical details
Download Catalog Clicks	Status	Success, Failed, Pending	Equals, Greater Than	Suggests serious interest & product comparison
Time on Product Pages	Numeric (seconds)	n/a	Greater Than, Less Than, Within Range	Longer dwell time = higher interest
Content Downloads	Type	Whitepaper, Case Study, etc.	Equals	Shows interest in product uses
C3: Social Interaction				
Social Share Clicks	Numeric	Number of Shares by Type	Greater Than, Less Than, Within Range	Potential reach, seeking opinions
Seller Review (Submit)	Boolean	Yes/No	Equals	Impacts seller reputation
Seller Review (Read)	Numeric	Number	Greater Than, Less Than, Within Range	Indicates the lead is researching the seller
Seller Rate	Numeric Rating	1-5 stars	Greater Than, Less Than, Within Range	Impacts seller's reputation
C4: Seller-Focused Actions				
Visit Store Click	Numeric	Visits	Greater Than, Less Than, Within Range	Exploring seller's other offerings
Company Profile Click	Numeric	Visits	Greater Than, Less Than, Within Range	Researching seller's reputation
Add to Contacts Click	Boolean	Yes/No	Equals	Wants to save seller info

Group #5 – Lead Engagement with Power Cozmo.

Group #5 focuses on the lead's overall interaction with our platform, providing insights into their buying patterns and preferences.

Buyer Type

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Buyer Type	Categorical	New, Returning, High-Value, VIP	Equals	Defines the lead's relationship to Power Cozmo platform. @ Munnaver, Consider defining thresholds for "High-Value" based on spend or order frequency or buyer subscription type.

Overall Engagement Score

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Overall Engagement Score	Numeric	0-100 (example)	Greater Than, Less Than, Within Range	Composite score based on multiple factors

Buyer Journey Stage

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Buyer Journey Stage	Categorical	Awareness, Consideration, Decision, Purchase	Equals	Indicates where the lead is in the buying process

Purchasing Behaviour

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Purchase History	Boolean	Yes/No	Equals	Indicates if they've bought from your platform before
Buying Frequency	Numeric	Purchases per month, year, etc.	Greater Than, Less Than, Within Range	Reveals how often the lead buys overall
Spending Patterns	Numeric	Average transaction value	Greater Than, Less Than, Within Range	Shows typical spending level per purchase

Buyer Interaction with Power Cozmo

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Review Rating	Numeric	1-5 stars	Greater Than, Less Than, Within Range	Indicates sentiment towards the platform (if reviews exist)
Wishlist Items	Numeric	Number of Items	Greater Than, Less Than, Within Range	Shows interest in specific products

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Search Term	Text	Keywords	Equals, Contains	Reveals what the lead is looking for
Quote Request(s)	Numeric	Number of Requests	Greater Than, Less Than, Within Range	Indicates intent across the platform
Time on Platform	Numeric (seconds)	n/a	Greater Than, Less Than, Within Range	Overall engagement level
Frequent Features	Categorical	Search, Product Filters, etc.	Equals	Reveals how the lead navigates the platform

Prefer Lead Communication Channel

Criterion	Data Type	Value Unit/Options	Operators	Tooltip
Communication Channel	Categorical	Email, Chat, Phone (if tracked)	Equals	Lead's preferred contact method
[Channel] Metrics	Percentage	0-100%	Greater Than, Less Than, Within Range	Shows engagement on each channel (Email-Chat-Phone)

For information

Implicit Interest

- **What it is:** Subtle signals inferred from browsing behaviour. Examples:
  - Time spent on a product page.
  - Number of product pages viewed.
  - Scroll depth on specific content.
- **Why it's less reliable:**
  - Curiosity vs. genuine purchase intent: A visitor might be researching, not necessarily ready to buy.
  - Distractions: A long dwell time could be due to the user stepping away from their device.
- **How to use cautiously:**
  - Can be a signal, but shouldn't be the sole trigger for high-urgency actions.
  - Best used in combination with other data points.

Explicit Interest

- **What it is:** Clear actions that demonstrate a higher level of engagement. Examples:
  - Quote request submission.
  - Adding items to a Wishlist.
  - Downloading product specifications.
  - Initiating a chat conversation.
- **Why it's more reliable:** The user is taking deliberate steps, showing direct interest in your product/solution.
- **How to use effectively:** These actions often warrant faster follow-up and prioritization by sales teams.

Measurable Metrics for buyer clicks and actions

Interaction Type	Measurable Metrics	System Considerations
Page View	Time on page, scroll depth, **heatmaps**, **mouse movements**, exit rate	Track using JavaScript events and analytics tools
Click	Click-through rate, clicked elements, click paths	Track using JavaScript event listeners and link tracking
Scroll	Percentage scrolled, scroll depth, scroll velocity, scroll events	Track using JavaScript scroll event listeners and libraries
Search	Search queries, results clicked, search time, search conversions	Integrate with search engine or database, track searches and subsequent actions
Download	Number of downloads, download completion rate, downloaded files	Track download links and file access, store download logs
Chat	Conversation length, sentiment, time, agent performance	Integrate with chat platform API, store chat transcripts and metadata
Quote Request	Number of requests, requested products, conversion rate, quote value	Store quote request details, track progress and outcomes
Contact Seller Form	Number of submissions, response time, conversion rate	Store form data, trigger notifications to sellers, track follow-ups
Order	Order value, order frequency, payment method, conversion rate, cart abandonment rate	Integrate with order management system, track order lifecycle events
Review	Rating scores, review text, sentiment, review impact on sales	Store reviews, display on product pages, analyse sentiment
Wishlist	Number of items, Wishlist conversion rate, time to purchase	Store Wishlist items, track add/remove actions, trigger reminders

Default Lead Scoring Value Table and algorithm.

Default values can be adjusted by admin, and seller can set based on his requirements.

Steps

1. **Calculate Weighted Scores:** For each criterion: Multiply the lead's **achieved points** (Information + Evaluation) by the criterion's **weight**. This gives you the weighted score for that criterion.
2. **Sum Weighted Scores:** Add together the weighted scores for *all* criteria.
3. **Find Maximum Possible Score:** Calculate the theoretical maximum score a lead could achieve if they got the highest points on every criterion. To do this:
   - For each criterion, multiply the **Max Points** by the **Weight**.
   - Sum these weighted maximums across all criteria.

4. **Normalize:**
    - **Divide** the lead's **Sum of Weighted Scores** (from step 2) by the **Maximum Possible Score** (from step 3).
    - **Multiply** the result by 100 to express it as a percentage.

Equation

Let's use some variables to represent this:

- **LS =** Lead's Overall Score (%)
- **WS_i =** Weighted Score for criterion 'i'
- **MP_i =** Maximum Possible Points for criterion 'i'
- **W_i =** Weight of criterion 'i'
- **n =** Total number of criteria

Overall Equation:

LS = ((∑ (WS_i) for i=1 to n) / (∑ (MP_i * W_i) for i=1 to n)) * 100

Information Points

- **Purpose:** Reward the mere existence of data about a lead.
- **Why This Matters:** Even basic information is valuable for:
    - **Personalization:** Addressing the lead by name, knowing their company, etc.
    - **Segmentation:** Targeting based on location, industry, etc., even if we don't know how "good" the lead is yet.

Evaluation Points

- **Purpose:** Score leads based on how desirable their information is.
- **Why This Matters:** Not all data is equal. Evaluation points help identify:
    - **Match with Ideal Customer:** Leads with the right job title, company size, etc.
    - **Level of Interest:** Do their actions (quote requests, content viewed) signal buying intent?

Weight

- **Purpose:** Control the relative importance of each criterion group.
- **How it Works:** Points for each criterion are multiplied by the weight. High-weight groups contribute more to the overall score.
- **Why This Matters:** Sellers should focus on what predicts successful conversions in *your* business. Weights let you fine-tune the scoring to align with this.

Establishing Total Points and Weights

1. **No Universal Limit:** There's no strict maximum for total points or weights across your entire system. It depends on how granular you want to be.
2. **Start with Baselines:**
    - **Information Points:** 1-3 points per criterion is a typical starting point.
    - **Evaluation Points:** Scale these based on how much better a "perfect" value is than an "okay" value. 1 to 5
    - **Weight:** A 1-5 scale provides decent differentiation without being overly complex.

Default Values Table

Criterion	Information Points	Evaluation Points	Max Points	Weight (1-5)
G#1 Lead Contact Info				
Contacts	5	0	5	4
Primary Email Address	5	0	5	5
Phone Number	3	0	3	3
Location	2	3 (If in target regions)	5	3
Job Title	2	3 (If relevant roles)	5	3
Lead Source	1	2 (If specific sources are high-value)	3	2
G#2 Lead Company Info				
Company Name	3	0	3	3
Company Size	1	0-3 (Scaled based on size)	4	3
Annual Revenue	1	0-4 (Scaled)	5	2
Industry	2	5 (If ideal match), 0-3 (Partial matches)	7	4
G#3A Lead BANT				
Budget & Money	2	0-8 (Scaled based on price range)	10	4

Criterion	Information Points	Evaluation Points	Max Points	Weight (1-5)
Authority	0	10 (If decision-maker)	10	5
Need	1	0-4 (Higher for stronger need)	5	3
Timeline	1	0-4 (Shorter timelines are better)	5	3
Challenges	2	3 (If you solve their pain points)	5	2
G#3B Fit with Product				
Need Alignment	0	10 (If perfect match)	10	4
Target Customer Profile	2	5 (If they fit your ideal profile)	7	3
G#4A Buyer Engagement				
Engagement Level	0-10 (Scaled)	0	10	3
Seasons Engaged	1-4 (More seasons is better)	0	4	2
Page Viewed	2	3 (If highly relevant page)	5	2
Page Revisits	1-3 (More revisits is better)	0	3	1
Time on Page	1	2 (If exceeding average)	3	1
Scroll Depth	1	2 (If read most of the content)	3	1
Clicks	1-3 (More clicks is better)	0	3	1
Element Clicked	2	3 (If high-value element)	5	2
Time Untouched	0	-5 to -10 (Penalty, longer = worse)	-10	2
G# 4B Buyer interaction with seller – Communication channel				
Email Open Rate	1 (Any opens)	2-5 (Scaled based on %)	6	2
Chat Response Rate	1 (Any response)	2-5 (Scaled)	6	2
Email Response Rate	1 (Any reply)	2-5 (Scaled)	6	2
Order Value	0	5-10 (Scaled based on average order size)	10	3
Order Frequency	1-4 (More orders is better)	0	4	2
Conversion Rate	0 (If no purchase)	5-10 (Scaled)	10	3
Quote Request	5	5 (High intent)	10	5

Criterion	Information Points	Evaluation Points	Max Points	Weight (1-5)
G#4C Buyer Int. - Actions				
Wishlist	2	2 (Interest, but not immediate)	4	2
Product Image Clicks	1-3 (More clicks is better)	0	3	1
Product Spec Tap View	1-3 (More taps is better)	0	3	1
Download Catalog Click	2	2 (Strong interest)	4	2
Social Share Clicks	1	0	1	1
Seller Review	1 (Left a review)	2-5 (Sentiment analysis)	6	1
Seller Rate	0	3-5 (Scaled based on rating)	5	1
Visit Store Click	1	0	1	1
Company Profile Click	1	0	1	1
Add to Contacts Click	2	0	2	1
Chat with Seller	2	3 (If they initiated)	5	3
Contact Seller	3	2	5	3
G#5 Buyer Engagement with Platform				
Buyer Type	0	2-5 (New < Returning < High-Value < VIP)	5	2
Overall Engagement Score	0-10 (If you calculate this)	0	10	2
Buyer Journey Stage	0	3-5 (Awareness < Consideration < Decision < Purchase)	5	2
Purchase History	1	4-10 (Scaled based on past value)	10	3
Buying Frequency	1-4 (More frequent is better)	0	4	2
Spending Patterns	0	2-5 (Scaled on average spend)	5	2
Review (Rating)	0	3-5 (Based on star rating)	5	1
Wishlist Items	1-3 (More items = more interest)	0	3	1
Search Term	1	1-5 (If matches relevant keywords)	6	2

Criterion	Information Points	Evaluation Points	Max Points	Weight (1-5)
Quote Request (Repeat)	3	2	5	2
Time Spent on Platform	0-5 (Scaled)	0	5	1
Most Used Features	1	1-3 (If using high-value features)	4	1
Communication Channel	0	2 (If matches their preference)	2	1
[Channel] Metrics	0-5 (Scaled based on responsiveness)	0	5	1

Action list with a focus on workflow and rules

Brief of possible Actions in our CRM:

1. Lead Scoring and Prioritization:

- Calculate lead score based on defined criteria (e.g., BANT, CHAMP, engagement).
- Set priority level (High, Medium, Low) based on lead score and additional factors.
- Assign leads to appropriate sales reps or teams based on priority, expertise, or territory.

2. Lead Group Management:

- Move leads to specific groups: Untouched, Nurturing, Qualified, Consideration, Recycled, Closed/Won, Closed/Lost
- Automatically update group membership based on lead score changes, activities, or milestones.

3. Communication and Engagement:

- Send personalized emails based on lead status, interests, or behaviour (e.g., welcome, nurturing, follow-up, re-engagement).
- Trigger automated SMS notifications for urgent actions or time-sensitive offers.
- Schedule follow-up tasks (calls, emails, meetings) for sales reps, ensuring timely outreach.
- Send lead information to marketing automation platforms for personalized campaigns and nurture tracks.

4. Sales Outreach and Task creation

- Assign leads to sales reps based on availability, expertise, or territory alignment.
- Create tasks for sales reps to initiate contact within a specified timeframe.
- Remind sales reps of upcoming calls or meetings with automated notifications.
- Log calls, emails, and meetings directly within the platform for activity tracking.

Leads Management and Rule creation Dashboard.

Overall Structure

Dear Amina! I recommend a tabbed or multi-section dashboard for easy navigation between the key areas:

- Leads Overview
- Criteria Management
- Actions Management
- Rule Builder

1. Leads Groups Overview

- **Visuals:** Use bar charts or pie charts to show the distribution of leads across groups. Include totals for each group.
- **Filtering:** Allow filtering by group, sub account assigned, lead source, etc.
- **New Group Creation:** with clear explanations of the purpose of each group for consistency.
- **Bulk Actions:** Option to move multiple selected leads between groups.

2. Criteria List View

- **Groups criteria and Table Format:** Use a table similar to our earlier work (criterion, data type, weight, tooltip, etc.).
- **Sortable Columns:** Allow sorting by weight, name, category, etc., to aid in prioritization.
- **Inline Editing (Ideally):** Clicking a field allows the user to adjust the weight, points.
- **"Usage" Column:** Shows how many active rules utilize each criterion.

3. Actions List View

- **Type/Category Filters:** Filter by action type (email, task, group change, etc.).
- **Clear Descriptions:** Avoid jargon. Example: Instead of "Trigger Campaign," use "Enroll lead in 'New Customer' nurture sequence".
- **Rule Association:** Show which rules trigger each action.

4. Rule Creation

This is the most critical section for usability! Here's how to make it powerful yet friendly:

- **Step-by-Step Wizard:** Guide the user through the rule-building process, breaking it down into smaller choices.
- **Visual OR Guided:** Either provide a drag-and-drop style builder or a clear sentence-style construction interface ("IF [criterion] AND [criterion], THEN [action]").
- **Templates:** Pre-defined templates for common rules that users can customize. I prepared templates covers essential scenarios
- **Preview Mode:** Show an example of how the rule logic would apply to past lead data to help in validation. Please go to last pages for clearing the concept.
- **Reporting:** Include a section for rule performance (actions triggered, outcomes). This is crucial for refining your automation over time.
- **Search:** Allow searching for leads, criteria, and rules across the entire dashboard.

Rules creation Concept

1. Rule Definition

- **Rule Name:** Descriptive name for easy identification (e.g., "New Lead Needs Outreach").
- **Trigger:** Define the event or condition that should initiate rule evaluation. Examples:
  - **Lead Status Change:** "Status = Untouched"
  - **Time-Based:** "Time Untouched > 24 Hours"
  - **Event/Action:** "Quote Request Submitted"
- Trigger Types
  - **Lead Status Change:** Rules activate when a lead's status updates (Untouched -> Nurturing, Qualified -> Customer, etc.).
    - **Use Cases:** Workflow automation. Moves leads through pipeline based on engagement or actions.

- **Modifications to fields** like Budget, Company Size, Job Title, name.
- **Time-Based:** Rules execute on schedule or relative to lead data timestamps. Examples:
    - **Absolute Time:** "Run this rule every Tuesday at 10 AM" (e.g., Weekly report generation)
    - **Time Since Event** "Time Untouched > 24 Hours" (e.g., Nurture workflows after inactivity)
    - **Time Since Field Update:** "30 Days After Order Placed" (e.g., Renewal reminders)
- **Event/Action:** Triggers tied to specific lead behaviour:
    - **Form Submissions:** Quote Requests, Contact Forms, Signups
    - **Content Engagement:** Download Catalog, Webinar Registration, Specific Page Views (Pricing, etc.)
    - **Communication:** Email Opens, Chat Interactions, Sales Call Outcomes
    - **CRM Data Updates:** Manual status changes made by sellers

- **Criteria:** The heart of the rule. Provide the following:
    - **Field Selection:** A dropdown of all your available criteria (Engagement Level, Industry, Budget, etc.).
    - **Operators:** Appropriate options based on the field type (Equals, Greater Than, Contains, etc.).
    - **Value:** Textbox for values (numbers, text) or dropdown for pre-defined options.
    - **Logical Connectives:** "AND/OR" buttons to combine multiple criteria.

    - **Execution Mode:** When sellers create a rule, include the following options:

        - **One-Time:** Executes as soon as a lead meets the criteria, then becomes inactive.
        - **Periodic:** Runs on a recurring schedule (hourly, daily, weekly, etc.). Sellers set the frequency.
        - **In Cycle:** Executes multiple times over a period, then becomes inactive (Ex: Send a nurture email every 3 days for 2 weeks). Cycle length is defined by the seller.

- **Actions:** What should happen IF the criteria are met:
    - **Update Lead Status:** Move to the next stage (Nurturing, Qualified, etc.).
    - **Send Email:** Select from pre-built templates or build custom email in the rule.

    - **Create Task:** Assign a task to a seller (follow-up call, etc.).
    - **Other Actions:** Potential additions, such as adding tags to leads, notifications, etc.
- **Priority:** A numerical ranking mechanism (1-10, or High/Medium/Low) for sellers to define rule execution order.
- **Blocking Rule:** Checkbox to designate if the rule prevents further evaluation if conditions are met.

2. User Interface (UI) Considerations

- **Ease of Use:** Drag-and-drop interfaces or **clear step-by-step** rule builders make it intuitive for sellers.
- **Visual Hierarchy:** Clear separation of rule sections (Trigger, Criteria, Actions).
- **Tooltips:** Provide brief explanations for each field and operator.
- **Presets:** Allow saving common rule combinations as templates for quick reuse.

3. System-Level Considerations

- **Rule Execution Frequency:**
    - **Real-time Triggers:** Actions for certain events (quote request) should be near-instant.
    - **Batch Processing:** Periodic evaluation (daily, hourly) for most rules.
- **Testing:** Enable sellers to test rules with sample data before activating them.
- **Logging and Reporting:** Track rule execution history and provide insights into rule effectiveness.

Example:

Rule Name: New Lead Needs Outreach **Trigger:** Status = "Untouched" **Criteria:**

- Time Untouched > 24 Hours **AND**
- Lead Source Equals "Website Form" **OR**
- Lead Source Equals "Trade Show Contact" **Actions:**

- Update Lead Status: "Nurturing"
- Send Email: "Welcome Email Template" **Priority:** High **Blocking Rule:** No

Definition of "Time Untouched"

Concept: "Time Untouched" should represent the duration since the lead's last interaction **indicative** of active interest.

Possible Actions, where we should calculate time untouched:

- **Responding to seller communication:** Email reply, chat message, etc.
- **Actions with purchase intent:** Quote requests, adding items to Wishlist, downloading product specs.
- **Significant content engagement:** Spending extended time on a product page.
- Variations & Considerations:

- **Time Thresholds:** We might offer sellers different thresholds: 24 hours, 48 hours, 72+ hours, periodically for specific times.
- **Action-Specific Tracking:** Track "Time Untouched" separately for certain actions. For example, "Time Untouched Since Quote Request".
- **Implicit vs. Explicit Interest:** Browsing behaviour is less reliable than direct actions. Use cautiously or weight differently in calculations.
- **Backend Logic:** our backend needs to track these interaction events (emails sent/received, quote requests, etc.) with timestamps.
- **Periodic Calculation:** A routine (daily, perhaps) will calculate 'Time Untouched' for each lead based on their most recent 'active interest' event.

"Preview Mode" functionality in the Rule Builder section In seller lead Leads Management Dashboard is

Understanding Rule Logic

Creating rules involves defining conditions (criteria) that trigger specific actions (emails, tasks, etc.). However, visualizing how this logic translates to real-world data can be challenging for sellers.

Preview Mode in Action

Here's how Preview Mode aids in this process:

1. **User Defines Rule:** The user builds a new rule using the available criteria and actions.
2. **Preview Mode Activated:** The user clicks a "Preview" button.
3. **Past Lead Data Sample:** The system retrieves a “sample set” of past leads (typically anonymized) that meet the defined timeframe (e.g., last 30 days).
4. **Rule Evaluation:** The system applies the newly created rule's logic to each lead in the sample set.
5. **Results Presentation:** The user sees a table or chart showing:
    - Total number of leads in the sample set.
    - Number of leads for whom the rule would have triggered an action.
    - Breakdown of triggered actions per lead (e.g., "5 leads would have received a 'Welcome Email'")

Benefits of Preview Mode

- **Confidence in Rule Design:** By seeing how the rule performs on real (even if anonymized) data, users can identify any issues or unexpected outcomes before applying it to live leads.
- **Refining Rule Logic:** Preview Mode can reveal if the rule is too broad or too narrow. Users can adjust criteria or weights to achieve the desired results.
- **Transparency and Communication:** If multiple users manage lead scoring and automation, Preview Mode provides a way to share and discuss the impact of a proposed rule before implementation.

Additional Considerations

- **Sample Size:** The size of the preview data set should be large enough to be statistically relevant, but not overwhelm the user with information.
- **Filtering:** Optionally, allow users to filter the preview data by specific criteria to see how the rule performs on a particular segment of leads.
- **Error Highlighting:** If the rule would have resulted in an unintended action for some leads, highlight these in the preview for further analysis.

Page View: Going Beyond Time on Page

Metrics:

1. **Time on Page:**
   - Track the time a user spends on a specific page from page load to exit.
   - Measurement: JavaScript events for page load and unload, timer tracking active session within the page.
   - Analysis: Compare average time on page across different content types, identify high-engagement and low-engagement pages.
2. **Scroll Depth:**
   - Analyse how far down users scroll on a page, expressed as a percentage of total page height.
   - Measurement: JavaScript libraries like Scroll Depth or Eventbrite JavaScript Scroll Track.
   - Analysis: Identify content sections that hold user attention, assess if crucial information is buried too deep.
3. **Heatmaps:**
   - Visualize areas of the page where users click, hover, scroll, or move their mouse.
   - Measurement: Heatmap generation tools like Hotjar, Crazy Egg, or Clicktale.
   - Analysis: Understand user focus points, optimize page layout and element placement for better engagement.
4. **Mouse Movements:**
   - Track how users move their mouse across the page, revealing areas of interest and confusion.
   - Measurement: Advanced website analytics tools with mouse tracking capabilities.
   - Analysis: Identify elements attracting unwanted attention, uncover potential UI/UX issues that disrupt user flow.
5. **Exit Rate:**

- Calculate the percentage of users leaving a page without visiting another page on your website.
- Measurement: Web analytics tools track pageviews and unique visitors.
- Analysis: Identify pages with high exit rates, investigate reasons for users dropping off (content quality, confusing calls to action).

Beyond Basics:

- Time Spent in Specific Segments: Segment pages into key sections and track time spent in each.
- Click Path Analysis: Analyze the sequence of pages users visit for deeper insights into navigation patterns.
- Scroll Speed: Analyze scroll speed to understand content readability and user engagement levels.
- Form Abandonment Rate: Track how often users abandon forms before completion, pinpoint friction points.

Insights for Sellers:

- **Product Page Performance:** Identify high-performing and low-performing product pages based on time on page, scroll depth, exit rate.
- **Content Optimization:** Recommend content adjustments based on heatmaps and scroll depth to improve engagement.
- **User Behaviour Patterns:** Uncover common navigation paths, interests, and pain points to personalize experiences and recommendations.
- **Buyer Journey Insights:** Track buyer progression through different stages (awareness, consideration, decision) to tailor marketing and sales strategies.
- **Seller-Specific Insights:** Provide sellers with insights about their products' performance and buyer behavior within their product pages.