Guide n° 12

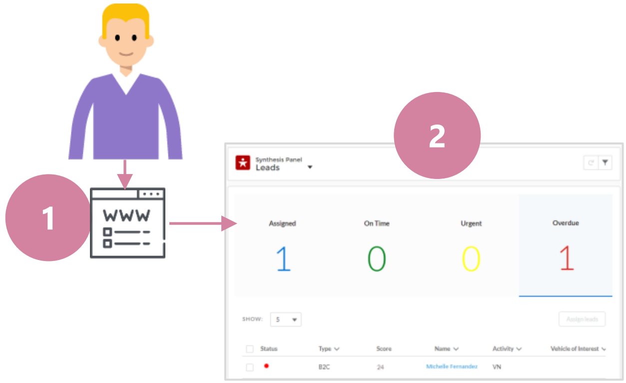
(very) Handy **guides**

Salesman & Sales Manager

Lead & Opportunity

Differences

How do I know when I have to deal with a Lead or an Opportunity in Customer FIRST?

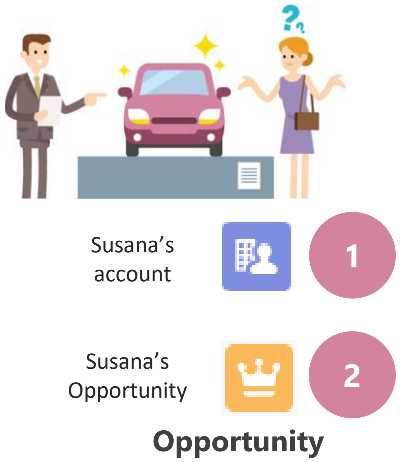


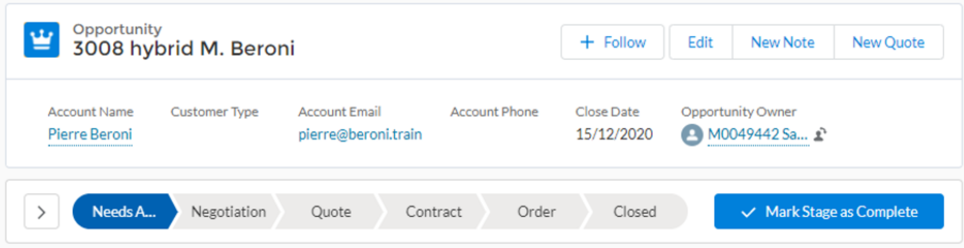
1. Michael has filled a webform on a brand website. He's **interested** in a new Hybrid model.
Doing so, Michael has given **2 pieces of key information**:
- **his contact details** (e-mail address, phone number)
- **his product of interest**

→ *these are the 2 main **components of a Lead**.*

2. I access the Lead on my **home page**. As a Salesman, my job is **to get in touch** with Michael, qualify his interest and start the sales process (for example by offering him a test drive)

When I mark the lead with a positive response and add the test drive **event** to my agenda, this will **convert** the Lead into an **Opportunity**, showing Michaels **Intention to purchase** and I can work that **opportunity** record through the sales process (by adding events, quotes and ultimately an order)





1. Susana has visited my retailer. I have identified her **intention to purchase** a vehicle. I cannot find her in the database as she is a new customer so I first create her account in Customer FIRST.

2. As I have validated her **intention to** purchase outside of Customer FIRST, I go straight to create a **Quick Opportunity** in order to manage and track all the business actions (Quote, Order Form, Order...) through the sales process.