Handy **guides**

Customer FIRST

Providing lead feedback

Updating lead outcomes

Providing positive and negative feedback on leads and recording that contact has been attempted

Updating Leads

Every lead should be updated in Customer FIRST to record the outcome of the customer contact. There are 3 possible outcomes that you can use:

Positive Result	Negative Result	Customer Unreached	▼

1. **Customer Unreached:** You should select this option when you have made a first attempt to contact the customer which was unsuccessful and you need to follow up.
   This is a temporary status to show that you have met SLA's and attempted contact but should be followed by either a positive or negative result when you have spoken to the customer OR you have exhausted attempts to contact them.
   When you record a 'customer unreached' result:
   - You have to create a reminder task for the next contact attempt
   - The lead will be changed to status 'contact attempted'

2. **Negative Result:** You should record a negative result when:
   a) The contact information on the lead is invalid
   b) You have contacted the customer and there is no immediate opportunity for a sale
   c) You cannot contact the customer after several attempts
   When you record a negative result:
   - The lead status will be changed to either 'discarded' (if you choose Invalid details) or 'No Opportunity' (if you choose any other option)
   - If you record one of the 'No Opportunity' results, an account/contact record will be created for the customer in the system

3. **Positive Result:** You should record a positive result when you have spoken to the customer, qualified their interest and are passing them on to the retailer to start the sales process.
   When you record a positive result:
   - The lead will be changed to status 'qualified'
   - An account/contact record will be created for the customer in the system
   - An 'Opportunity' will be created for the retailer to manage through the sales process and ultimately, this is where they will start the vehicle order process to show that the lead has resulted in a sale.

Why is it important to updating lead outcomes?

- You need to update every lead with either positive or negative status because:
  - It will remove it from your list of leads to be managed
  - It will ensure that the brand database is kept up to date with the correct info from the customer
  - It will be used to trigger important automated communications to nurture customers and generate sales (e.g. leads in a 'No Opportunity' status can be pro-actively contacted to nurture them back into the retailer)
  - The **account** and **opportunity** records generated by correctly qualifying leads will be used by the sales admins in the network to correctly place customer orders and reduces the need for them to re-key customer info into the system.

If you pass leads to the network WITHOUT contacting a customer, please record a positive outcome to ensure that a customer account record and opportunity is created to be picked up by the retailer.

For more information on how to record a 'positive', 'negative' and 'customer unreached' result, please view the 'how to' video's in the repository