Feature:

Admins with lead routing access under the Setup tab may create lead pools in the lead routing section.

These pools will allow the automatic assignment of leads which users may accept or reject.

Admins, as well as users with lead routing enabled may review lead reports on any leads routed (which they have access to).

WARNING:

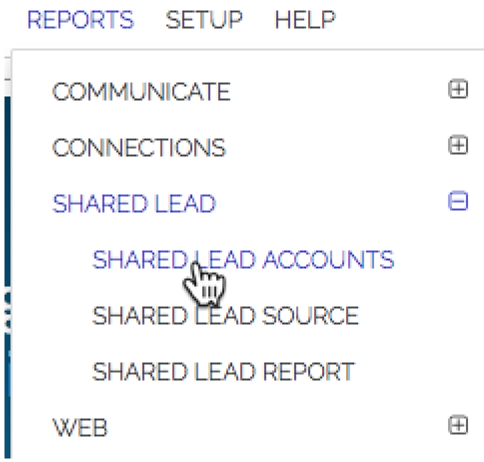
In order to use this feature properly, any smart lists with competing rules need to be disabled. Otherwise, leads may be shared before they can be routed to the intended user.

Who will be using this?

Marketing managers and Channel Managers in particular; but any users who have lead routing enabled.

Shared Leads Account

Go to Reports > Shared Lead Accounts


REPORTS
SETUP
HELP
COMMUNICATE
CONNECTIONS
SHARED LEAD
SHARED LEAD ACCOUNTS
SHARED LEAD SOURCE
SHARED LEAD REPORT
WEB

Shared Lead Accounts

Organization Groups: None

Organizations: Across Company

Users: All

Generate

Stats

1

Search for records

	Name	Total Leads	Active Leads	Inactive Leads	Amount	Opp. Conv Ratio	Opp. Close Ratio
	Zwolle Water System, Town of ...	1	0	1	0.00 USD	0%	0%
	Zurqui Construction Services	2	0	2	0.00 USD	0%	0%
	Zurqi Construction	1	0	1	0.00 USD	0%	0%
	Zone Two Water System, Inc.	1	0	1	0.00 USD	0%	0%
	Zonatherm Products Inc.	1	0	1	260,198.56 USD	100%	0%
	Zonatherm Products Inc	1	0	1	0.00 USD	0%	0%
	Zmm Inc	4	0	4	0.00 USD	0%	0%
	Ziegler Cat Inc	1	0	1	0.00 USD	0%	0%
	Zhengyu	1	0	1	0.00 USD	0%	0%
	Zgouvas Eiring And Associates	1	0	1	0.00 USD	0%	0%

Lead Reports Accounts:
This report bifurcates and presents the different segments of the leads that have been shared and created by different users.

1: List of organization Group: In case if the logged in user has access to multiple organization groups then those groups will be listed, if a user select any organization group then the drop down options in 2 and 3 will be refreshed and in option 2 only those organizations which are pertaining to the selected organization group will be listed.

2: List of organizations: This lists all the organizations the said logged in user has access to.

3: List users: This lists all the users that the logged in user has access to, for example Sales Manager may have access to all the Sales Rep under his belt.

4: Depends upon the organization group, organization and user which is being selected a grid of all the leads belonging to different accounts aka lead/contact company will be listed

Description of columns in reports is as follows:

Name: Name of the account or contact company

Total Leads: Number of leads/contacts from the said account which has been shared with the users/organizations/organization group.

Active Leads: Out of all the leads which has been shared, how many leads have at least done one activity. An activity in Mindmatrix includes:

Lead or Contact completed the following --

- Opened an email
- Clicked any link in an email
- Visited a website

- Clicked a trackable link
- Visited a web media (landing page created in Mindmatrix or website page created in Mindmatrix)
- Viewed a print asset

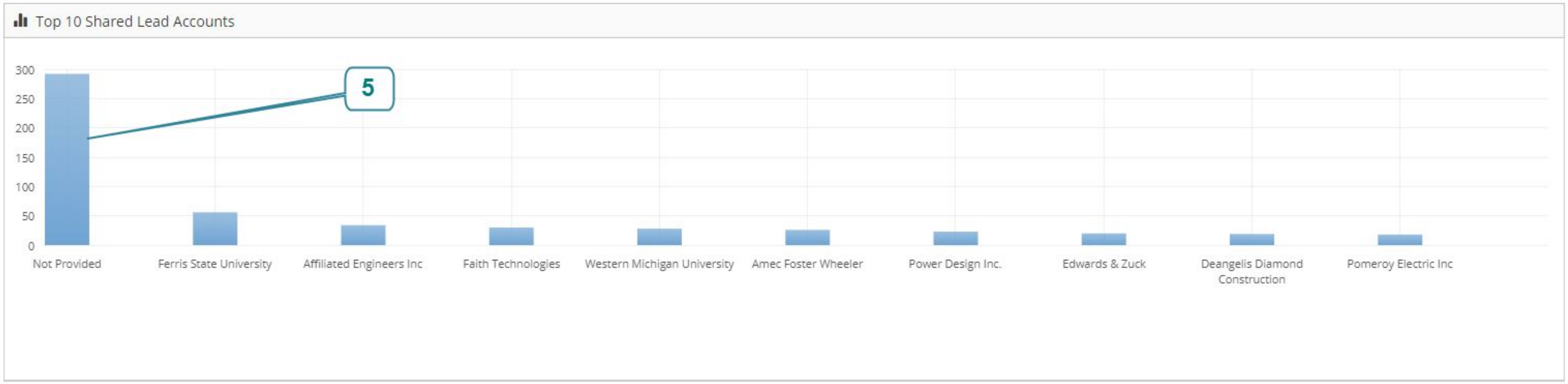
The difference between active and inactive leads is that any lead which has done at least one activity would be considered as active lead and those who have not done anything will be taken as inactive leads.

In Active Leads: As explained above, the remaining leads who have not done anything so far would be listed under this heading. The sum of Active and Inactive lead should be the total leads.

Amount: Amount is the sum of the opportunity amount where these leads have been associated or tagged in. So, if a lead has been used in 2 opportunities then the amount would be sum of those two opportunity amounts.

Opportunity Conversation Rate: This is the percentage of leads that have been used in the opportunity. For example, if you have 5 total leads and and two of them has been used in the opportunity, this would result in a 40% Opportunity Conversation Rate.

Opportunity Close Ratio: As indicated, this shows the ratio of the opportunity belonging to these leads which has been closed.



This graph shows the top 10 accounts whose lead has been shared to users. You can click on these graphs or the numbers given in the account grid in option 4. That will open a grid in a pop-up window which will list all of the users that these leads from these accounts have been shared with.

This pop-up window further bifurcates the sharing by users and this grid lists all the individual users who have been shared the leads with them. Having the same active, & opportunity columns indicating how many of these leads are active, inactive, how many of them has been used in the opportunity etc.

I have detailed the additional column, “No User Activity” below.

No User Activity: This provides the number of leads which have been shared with the user where the user has not performed any activity with these leads.

Activities include any engagement that can be automatically tracked by Mindmatrix for example:

- Associating that lead to an opportunity
- Sending an email to that lead
- Sending a print asset or web media to that lead

One can click on these numbers to see the list of the leads

Each of these grid rows are clickable which will take the user to the Reports page of the said lead.

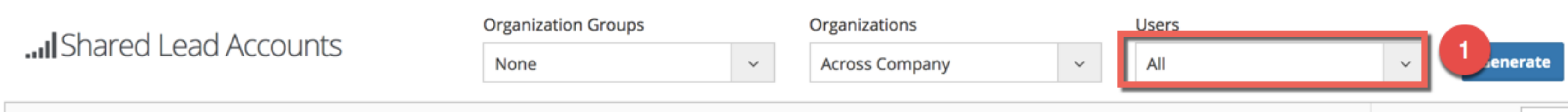
Note: In this report only those leads will be considered those who have company name in their data, all the leads which do not have company name will be shown under the “**Not provided**” heading.

TESTING THIS REPORT (Shared Lead Accounts)

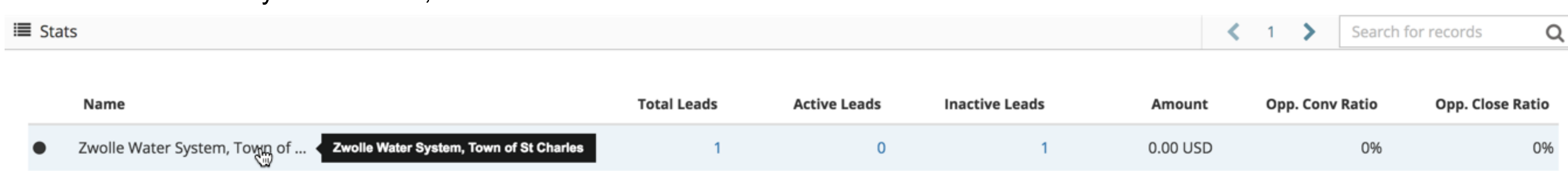
Test this report by following the steps below (you may need to refer back to other lead routing documentation to complete the listed tasks).

1. Admin user should route a lead to any User
2. In the user account, the lead should be routed to another user.
3. Once the lead is accepted, in the report in the admin or recipient’s account, you should be able to complete the following steps:
    a. Click on Reports and select Shared Lead > Shared Lead Accounts

    b. Select or search for the User who now owns the lead and click “generate”.



    c. For the selected user you shared to, the account name should be visible on the left-hand side:

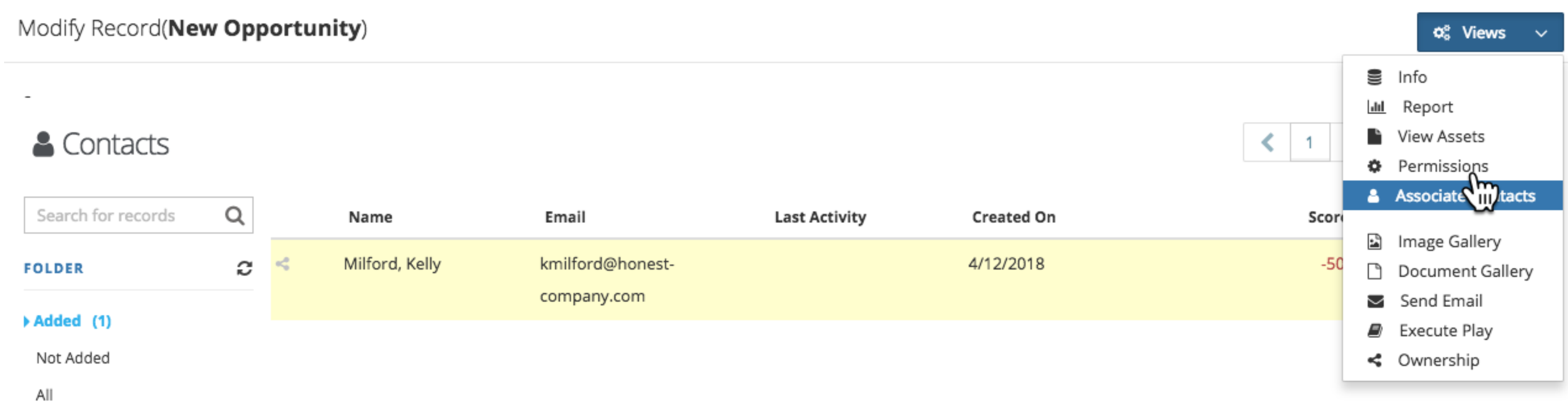


d. Verify that the account name of the lead you shared is associated with the user selected.
e. Click on the number underneath “Total Leads”. The lead you shared should also be visible.

Testing the Active, Inactive Leads, Amount and Opp. Conv Ratio, Opp. Close Ratio columns

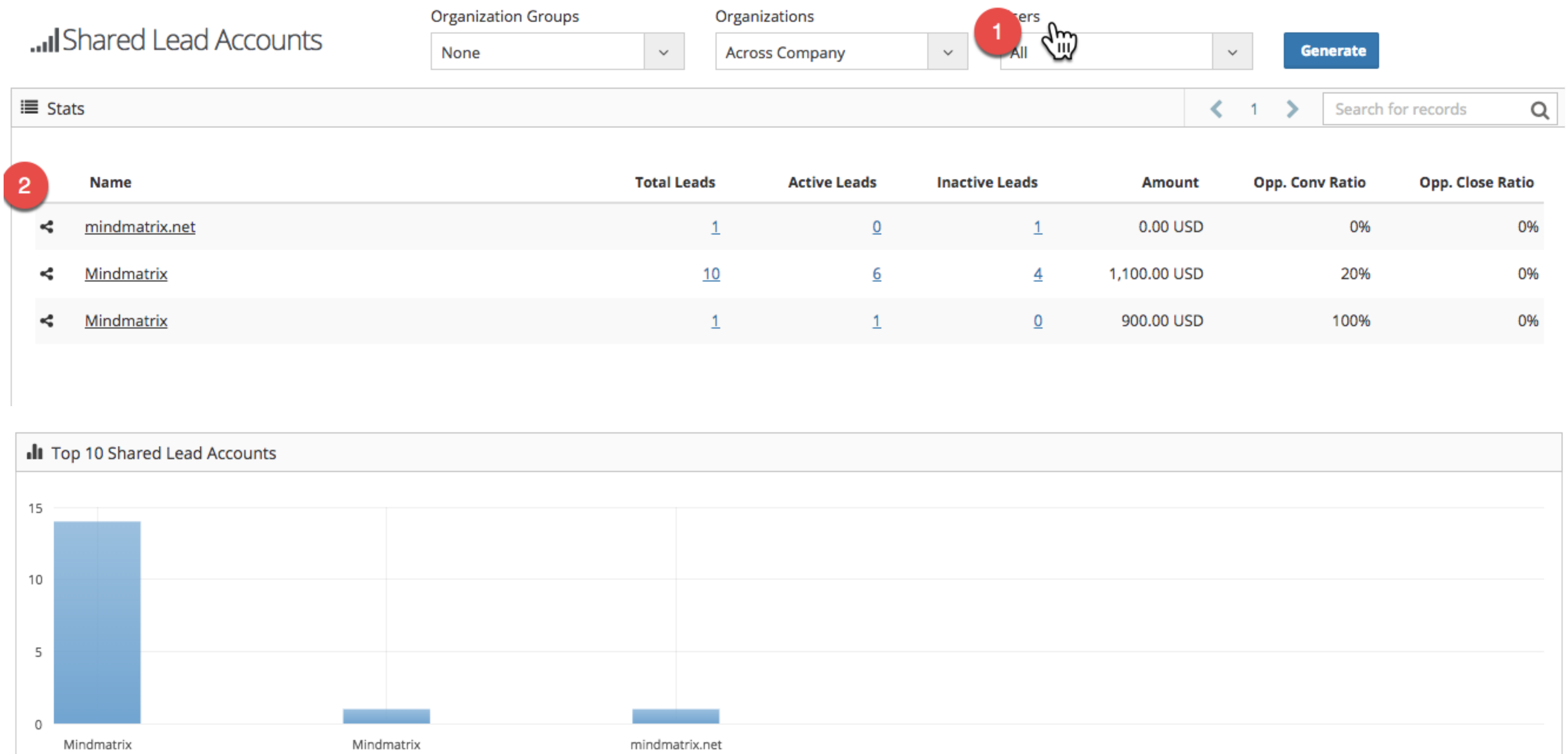
In the Distributor account which owns the lead, associate the lead to an opportunity.

1. In the user account where the lead was routed, create an opportunity and associate it with a lead. (Associated leads should be visible in the Associated Contacts section. In the example below, “Milford,Kelly” is associated with the Opportunity - New Opportunity.)



2. Refer back to the Admin account and check the Shared Accounts Report again. Search for the User where the lead was associated with an Opportunity and review the following:
   a. Verify that the “Amount” value matches the value associated with the opportunity.
   b. You should also see the Opp. Conv Ratio or Opp Close Ratios update if any further action was taken with the opportunity.
   c. To change the value amount or Opp. Conv Ratio or Close Ratios associated with a shared lead
      i. Navigate back to the test account and associate the lead with additional opportunities.

ii. Add additional routed leads to the Opportunity.



Name	Total Leads	Active Leads	Inactive Leads	Amount	Opp. Conv Ratio	Opp. Close Ratio
mindmatrix.net	1	0	1	0.00 USD	0%	0%
Mindmatrix	10	6	4	1,100.00 USD	20%	0%
Mindmatrix	1	1	0	900.00 USD	100%	0%

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<u>What reports should be visible to the User who receives the leads?</u>

Recipients who accept leads should be able to see all of the above data from their own accounts.

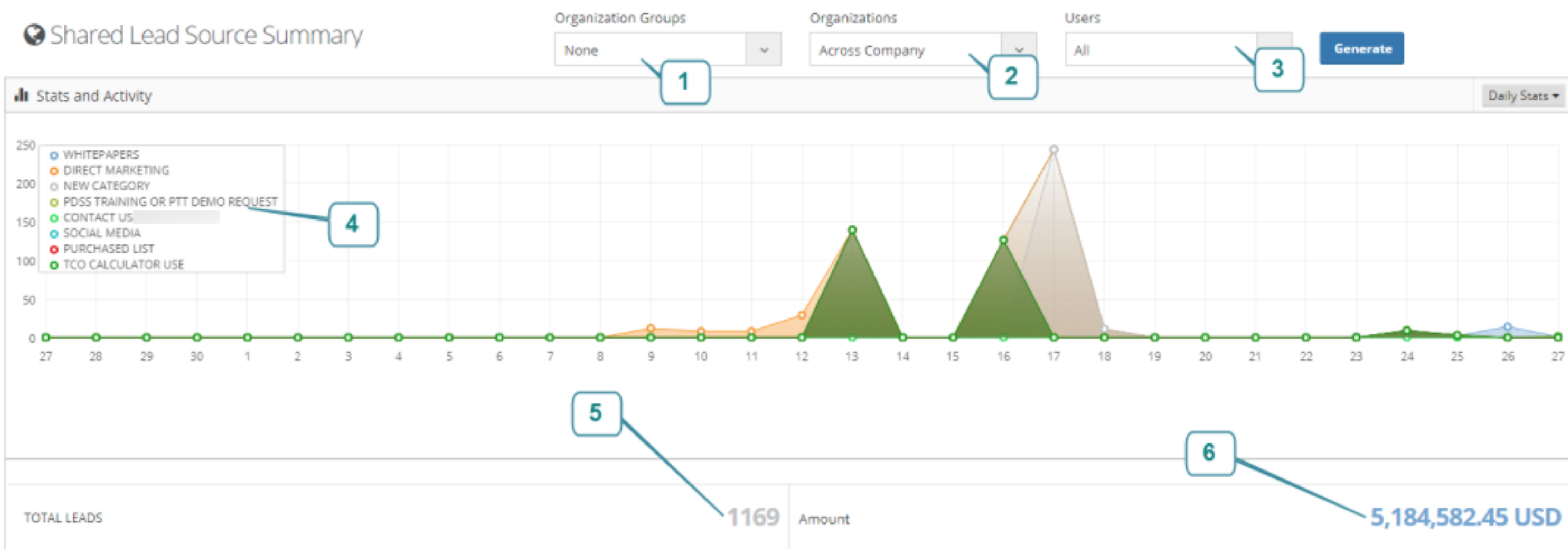
The only restriction is based on

1. Leads routed to them
2. Permission to view other Users/Organizations

If leads are not visible in all 2 scenarios, then the cause is a sharing issue between Users.

Shared Leads Source Report:

As in the above report the leads were divided by the account name or contact company name, this reports all the leads based on the sources they came into the system and different touch points a particular lead has performed.



The first three options functions exactly as it is explained in the above report i.e. Shared by Accounts

4: A graphical presentation of the leads came through different sources is presented, you can change the data by day, week and month

5: Total leads that has been shared to the selected group of users is summed up
6: All the opportunity amount with those leads has been summed up and presented.

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Shared Lead Source Report

Name	Total Leads	Active Leads	Inactive Leads	Amount	Opp. Conv Ratio	Opp. Close Ratio
CONTACT US,	1	0	1	0.00 USD	0%	0%
DIRECT MARKETING	705	443	262	4,990,745.67 USD	0%	0%
NEW CATEGORY	262	0	262	302,104.26 USD	0%	0%
PDSS TRAINING OR PTT DEMO ...	282	277	5	1,443.50 USD	0%	0%
PURCHASED LIST	277	277	0	1,443.50 USD	0%	0%
SOCIAL MEDIA	277	277	0	1,443.50 USD	0%	0%
TCO CALCULATOR USE	277	277	0	1,443.50 USD	0%	0%
WHITEPAPERS	444	160	284	481,225.63 USD	0%	0%

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7: The grid is presented from the perspective of lead sources (this is all touch-points of the lead) instead of the lead accounts. Apart from that every other heading in this grid remains the same as explained in the above report.

The subsequent number clicks will open the list of the users with whom the leads has been shared. The grid that will open by clicking on these numbers will be the same as what we have already seen in the previous report. That will list all the users with whom the leads has been shared, with the number of active, inactive leads, number of opportunity assigned to those leads as well as all the leads on which the user has not performed any activity i.e. No User Activity.

TESTING THIS REPORT (Shared Leads Source)

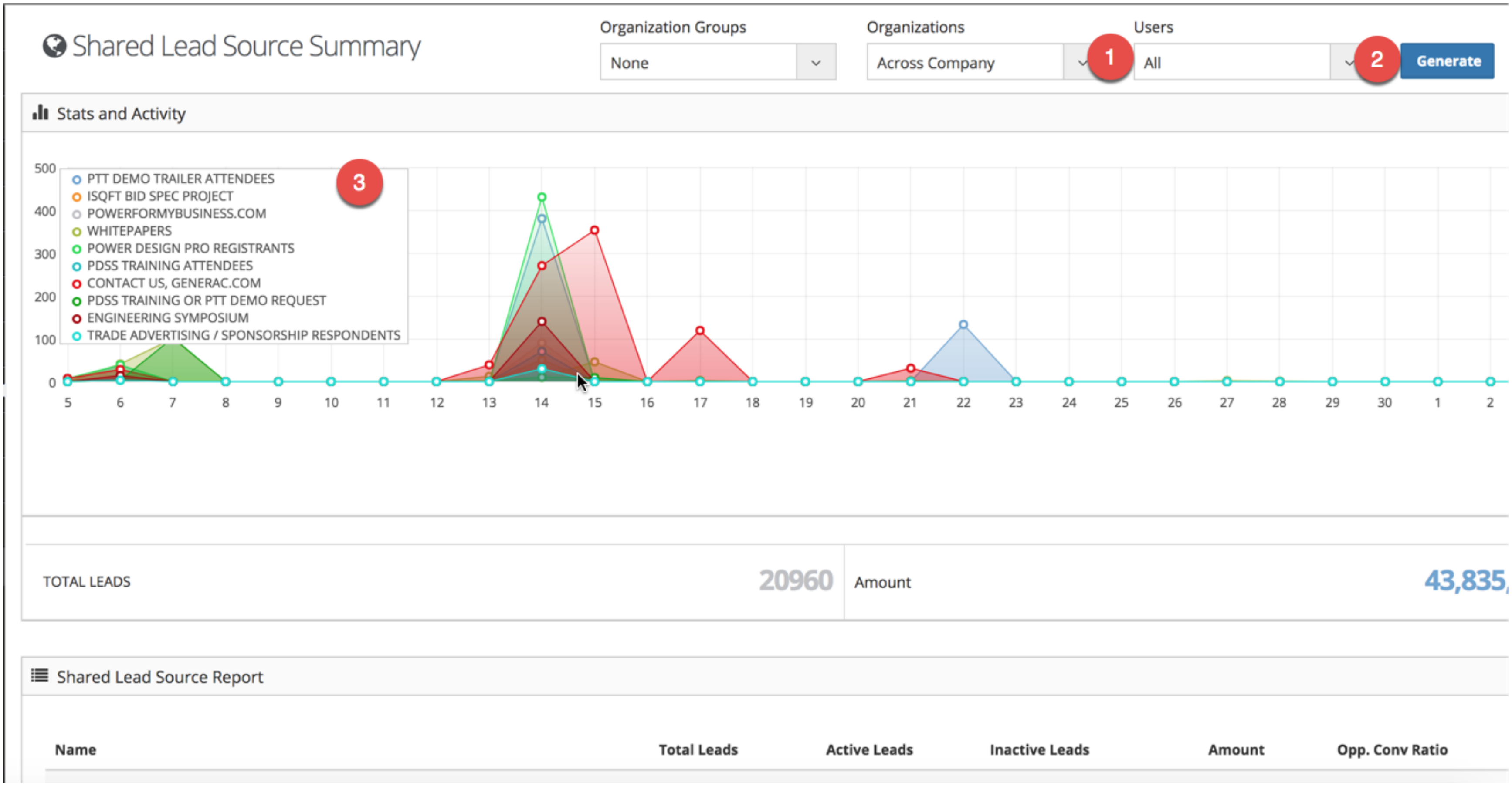
Test this report by following the steps below (you may need to refer back to other lead routing documentation to complete the listed tasks).

From the admin account or any other account where a lead has been routed:

1. Navigate to the Reports > Shared Lead > Shared Lead Source page.

2. After completing the routed lead tests, check this report to review the source summary and value as shared above.
    a. We recommend starting with a few leads that you have routed/accepted for different users.

b. Select the User account under Users and click Generate

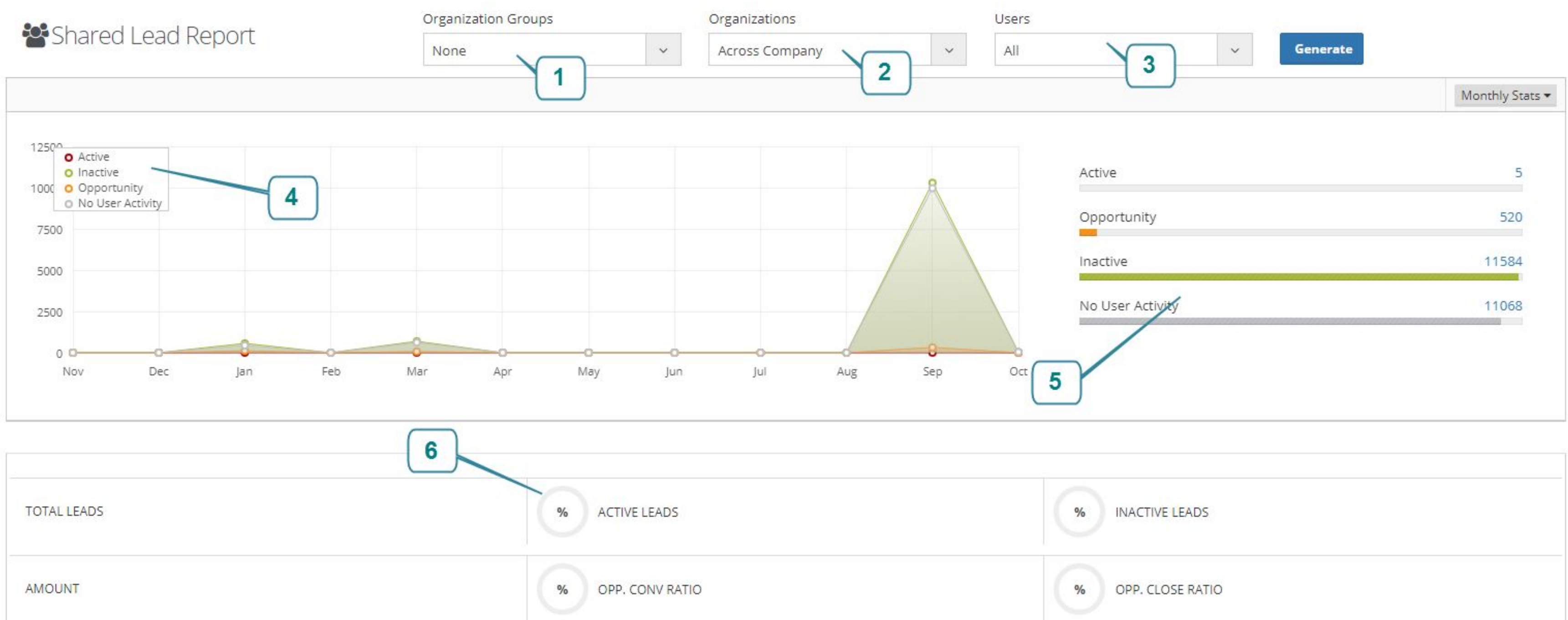


c. Verify that the (3) lead sources are correct and review the (4) Name, Total Leads, Active Leads, Inactive Leads, Amount and Opp Conv. Ratio. (These are populated when leads are associated with an opportunity). To make a leave “Active” you must send the lead an email or asset and it must interact with that asset.

d. Verify that the name of the lead source is also available in the Name Column. It should match the source from your sample lead.

Leads Report:

The above two reports are bifurcating the leads by account name and source, however this report doesn't apply any of those filters. This takes all the leads into consideration and gives different set of data.



The first three options (Organization Groups, Organizations, Users) in this report are consistent with all previous reports.

4: A graphical representation of all the leads based on the active, Inactive, Opportunity and No user activity on one side, and the same data represented in #5 on the other side.

6: Summation of all the leads as in how many total leads, what are opportunity amounts, what is the percentage of the active leads, inactive leads, Opportunity Conversion Ratio and Opportunity Close Ratio has been calculated.