

Lead Management

Standardise and track the sales process

Process overview: Lead Management



Lead Management in Abacus CRM tangibly tracks your sales process from the initial contact to the final sale. The leads are clearly recorded and supplemented with a processing status and other information, such as the sales opportunity.

Lead management is a crucial process for companies to efficiently identify, acquire and nurture potential customers. With Abacus Lead Management, you record and log all activities aimed at persuading a prospective or existing customer to make a purchase.

Transparent documentation

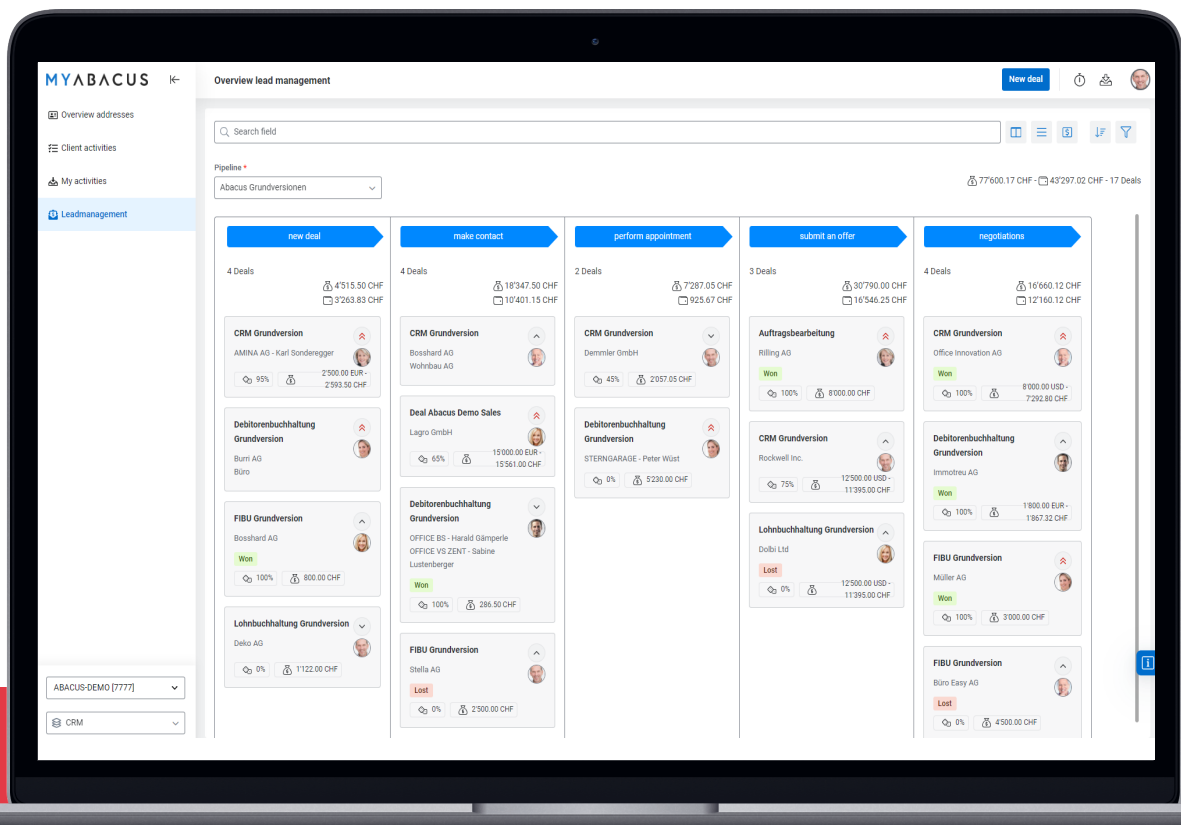
The lead documents the status, the sales opportunity in per cent, the planned closing date, the persons responsible, the origin of the lead and the value of the lead. Transparent documentation ensures traceability of sales activities and weights sales on the basis of the sales opportunity.

Responsibilities and status also visible in CRM

The lead information is not only visible in Lead Management, but also in CRM at the level of the contact person or organisation. This prevents interested parties from being contacted twice and authorised persons in the company can view the status of the lead transparently.

Filter and evaluation options

The leads can be sorted according to the assigned phase in the sales process or according to the planned closing date. With the Abacus Data Analyzer, you can visualise open and closed leads and measure the success of your sales activities.



Your benefits

- Transparent documentation of leads with status, sales opportunity, responsibilities and value
- Lead information also visible in CRM at person or organisation level
- Complete integration of Abacus Activity Management
- Visualisation of leads with the Abacus Data Analyzer
- An offer can be created from the Lead Management in Order Processing. Once the lead has been won, an order can be generated from the offer

More information can be found under: abacus.ch/en/leadmanagement

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