Leads & Opportunities within Dynamics 365

Roles and responsibilities

Marketing Tele Sales – profiling of potential leads for correct contact details (schedule time to brief with digitalsales.campaign@firstdistribution.com)
Customer Success – Partner recruit lead qualification before an Account Manager or Brand resource is required (brand needs to schedule time with Suki, Lerato and Andy to brief)
Brand – BANT (budget, authority, Need, Time) or SQL (sales qualified lead) qualification, assign to AM directly (for end user partner assignment). Allocate within Dynamics 365
Digital Sales – Potential overflow when leads are not being handled efficiently
Account Manager – Partner on-boarding and opportunity closure
Regional Manager – Manage all leads and opportunities with direct reports
Sales Manager – Manage neglected leads and opportunities with teams

Leads – net new partner recruits

Leads are potential net new partner accounts for First Distribution. These are accounts that still need to be on-boarded and could have a requirement for a brand / product on-boarding too. These leads are to be updated every 2 days since they will have already been qualified by Marketing, Customer Success or Brand and the expectation is that these will be successfully on-boarded.

The lead owner is required to make contact with the potential new partner on a regular basis to help progress the on-boarding as well as potential sale (which will become an opportunity).

All fields within the lead record are to be updated wherever possible. Mandatory fields include:

- Contact name
- Contact number
- Contact email
- Company name
- Company Accpac Number (required before assigning to OPS)
- Vendor associated

The timeline is where updates need to happen on a regular basis. Any activity that has been assigned needs to be actioned and closed as soon as possible and any status updates need to be noted within the timeline. Emails and appointments can also be administered directly from here within the lead record. - [Add an appointment, email, phone call, notes or task activity to the Timeline in a Model-driven app - Power Apps | Microsoft Docs]

Should a net new partner lead be lost or disqualified, the following information is required when closing as lost:

- Reason for the loss
- Contact person and details that made the decision

Opportunities – end User leads / deals

1. Opportunities are end user leads that are assigned to a partner (account). The actual end user company name will be populated within the **Description** field of the opportunity and the partner assigned will be populated within the **Account** field. The owner of the lead will remain the Account Manager allocated to the specific partner.

   OR

   If you have a deal with an existing account that you want to track and follow up on using Dynamics. You can create an opportunity from an email or add it manually into the system.

2. We should expect feedback on a weekly (7 days) basis for end user leads passed onto the partner since we have paid for the leads and the least they can do is provide us with regular feedback.

3. It is recommended to create a basic spreadsheet with the relevant opportunity details to send to the partner to make it as easy as possible for the partner to view and update. The only field the partner should need to update is a status / feedback field.

4. All fields relating to the opportunity (end customer lead) below should be included the feedback sheet:
   - **Name**
   - **Surname**
   - **Contact number**
   - **Email address**
   - **Company name**
   - **Status** (options below):
     - *Not made contact yet*
     - *Waiting feedback from end user*
     - *Proposal in progress*
     - *Won*
     - *Lost / Not interested*

5. Even if you tell them to simply update the sheet weekly, whether they have managed to contact every lead, or just 1 or 2 – that will be fine.

6. For your opportunities loaded on D365, you will need to update the records with the feedback (even just to say “partner has not progressed” or “no feedback received”) on a weekly basis.

7. When closing and opportunity it is important to note the revenue generated or lost as part of the opportunity. For lost opportunities we may not know what the revenue would have been but won opportunities will have an order value attached to it. Please complete for reporting purposes.

Definitions of main components

- Dashboards / Activities – high level view of assigned activities that need to be actioned
- Leads – Net new partner recruit prospects
- Opportunities – End customer leads that are assigned to existing (or newly on-boarded) partners. Or existing Account Opportunities that you wish to track.

- Account – Partners allocated to the user
- Contact – Contact people within the accounts allocated to the user

Process

1. Lead is assigned to user as the owner
2. Owner makes urgent contact with the lead contact and updates the record with all relevant and available information
3. Timeline to be updated with type of contact made and any actions in progress such as:
    a. Email
    b. Phone call
    c. Task
    d. Appointment
    e. Note
4. Send new partner on-boarding documentation as required and keep the record updated by following up until documentation is received back
5. Lead owner to ensure new partner is on-boarded into Accpac while keeping the record updated
6. Once the new partner is on-boarded, the lead owner assigns the record to Jessica Schoeman in Operations for Dynamics 365 loading
7. Jessica Schoeman will assign the record back to the user as an opportunity
8. User who is now the owner of the record (opportunity) again, continues to update the record with relevant proposal information such as:
    a. Vendor
    b. Brand requirements
    c. Quote requirements
9. Once the deal has reached the point of decision, the record owner is required to close the opportunity either as Won or Lost and is to provide as much detail as is available within the closing remarks – including the actual revenue.

Outlook integration

1. Add new contacts
2. Update existing contacts
3. Create lead/opportunity directly from email
4. Task and appointment integration