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Documentation Modules

Leads

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Overview

The Leads module within the CloudBlue Connect portal allows Vendors to create and manage Lead Templates, as well as view and manage individual Leads and contained Leads Details to help facilitate customer opportunities from the marketplace the Lead form resides.

While transacting products and creating subscriptions is the primary goal, generating and managing leads can provide channel partners a host of benefits including:

- **Improved Customer Acquisition**: Effective leads management helps identify and capture potential customers, increasing the chances of converting them into actual buyers.
- **Enhanced Customer Relationships**: Leads management allows for better tracking of interactions with potential customers. This helps in building stronger relationships through timely follow-ups and tailored communication.
- **Increased Sales Efficiency**: With a structured leads management system, sales teams can prioritize and focus on high-quality leads, improving their efficiency and productivity.
- **Improved Operations**: Automated responses and notifications ensure that potential customers are engaged quickly.
- **Centralized Data Management**: Consolidates all lead information in one place, making it easy to access and manage, while leveraging the rest of CloudBlue's platform functionality.

About Leads

Leads are used to represent incoming information from perspective customers for specific products and specific marketplaces. These leads include the information that was defined in the fields within the Lead Template was that listed in the marketplace.

Once a Lead comes in, it is represented as a Lead Record (or "Lead Details"). Within this Lead Details page, users can see the Lead ID, the Product, Distributor, and Marketplace that the Lead is specified for, the Opportunity Details (as reflected on the Lead Template), and the various metadata about the lead, such as creation date, update date, and status.

Once a Lead is within the CloudBlue system, users can mark the **Pending** Lead as either **Qualified** or **Invalid**. Generally, the Lead statuses are defined as follows:

- **Pending** – Default status when the Lead comes from the marketplace. Vendors can then act upon the lead and push the lead into the next logical status.
- **Qualified** – If the Vendor determines that the Lead is valid and legitimate, they can mark the Lead as qualified. This means that the Lead has progressed to the next sales operational step – such as the moving the lead to a CRM or ERP and/or contacting the vendor – and the Vendor can complete their standard procedure for valid leads.
- **Invalid** – If the Vendor determines that the Lead is invalid and not a qualified opportunity, the lead can be marked as Invalid. This means that the Lead no longer has any qualifying subsequent steps.