



SAP Best Practices

Lead Management (C30)

Business Process Documentation

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English

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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

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Lead Management

1 PURPOSE

The purpose of this document is to describe the creation, qualification, and further processing of leads that arise from inbound and outbound activities.

2 PREREQUISITES

2.1 Master Data and Organizational Data

Essential master and organizational data were both created in and/or replicated to your CRM system during the implementation phase, such as the data that reflects the organizational structure of your company and master data that suits its operational focus, for example, master data for materials and customers.

Use your own master data (or the following Baseline Package scenario data listed below if you have installed an SAP Best Practices Baseline Package) to go through the business process procedure:

Master / org. data	Value
Prospect 1 (customer)	100009 (Customer Domestic 09)
Prospect 2 (customer)	100001 (Customer Domestic 01)
Prospect 3 (customer)	100002 (Customer Domestic 02)
Contact Person	Frank Bauer
Product	H11 (Trading Good...)
Employee Responsible	10400 (Richard Lion)
Sales Representative	10010 (Michael Curtis)

2.2 Preceding Process

The scenario described in this *Business Process Documentation* is part of a bigger chain of integrated scenarios. So, as an option, you may first have completed the following business processes and conditions before you start any activities in this scenario:

Business condition	Scenario
A number of leads that might have been created automatically from a campaign execution (see scenario <i>C39 - Lean Campaign Management</i>) can now be qualified. This scenario would then start with process step <i>Qualify Leads</i> .	<i>Lean Campaign Management (C39)</i>

2.3 Roles

Use

The following roles must have been created to test this scenario using the SAP CRM WebClient UI. The roles in this Business Process Documentation need to be assigned to the system user(s) testing this scenario.

Log on to the CRM WebClient UI with the following users:

Business Role	Bus. Role ID	System User	Employee	Password
BP Marketing Employee	BP_MKT_EMPL	MKT_EMPL	Richard Lion	welcome
BP Sales Employee	BP_SLS_EMPL	SALES_EMPL	Michael Curtis	welcome
BP Marketing Manager	BP_MKT_MAN	MKT_MAN	Melanie Richard	welcome

2.4 Preliminary Steps

2.4.1 Log on to CRM WebClient UI

Use

The purpose of this activity is to describe how the marketing employee gets access to the SAP CRM WebClient UI. There are two options: Access from SAPGUI or via URL.

Prerequisites

The appropriate SAP CRM WebClient role for the marketing employee has been assigned to the marketing employee user (*MKT_EMPL*) in the CRM system.

Procedure

1. Close all open browser windows.
2. Access the SAP CRM WebClient UI:

Option 1: Access from SAP GUI via Transaction:

1. In the input field for transactions, enter transaction **CRM_UI** and press Enter.

Option 2: Access from SAP GUI:

1. Log on to the CRM system with the user for the BP Marketing Employee.
2. From the SAP menu, choose *Favorites*. From the context menu, choose *Add Other Objects*.
3. Select URL type *BSP Application*.
4. Enter the following data:

Field name	User action and values
BSP Applicat.	CRM_UI_START
Description	CRM WebClient UI
Start Page	default.htm

5. Choose *Continue*.
6. Choose *CRM WebClient UI* from the Favorites.
7. In the dialog box *SAP Web Application Server*, enter the following data and choose *OK*:

Field name	User action and value
User name	MKT_EMPL
Password	welcome

Option 3: Access via URL:

The CRM WebClient UI can also be accessed using a Uniform Resource Locator (URL). The URL of the CRM WebClient UI is:

[http://sapds5.pal.sap.corp:8003/sap\(bD1lbiZjPTAwMSZkPW1pbg==\)/bc/bsp/sap/crm_ui_start/default.htm](http://sapds5.pal.sap.corp:8003/sap(bD1lbiZjPTAwMSZkPW1pbg==)/bc/bsp/sap/crm_ui_start/default.htm)

Note: Make sure the proxy settings are correctly set for the browser.

Result

You have entered the SAP CRM WebClient user interface as BP Marketing Employee with user *MKT_EMPL*.

3 PROCESS OVERVIEW TABLE

Process step	Business condition	Business role	Expected results
Create Target Group for Lead Generation	Attribute list with attributes	Marketing Employee	Target group
Create Leads for Target Group	Target group	Marketing Employee	Leads for predefined target group members
Create Leads Manually		Marketing Employee	Leads
Qualify Leads	Lead	Marketing Employee	Questionnaire level
Distribute Leads	Lead	Marketing Employee	Lead distributed
Transfer Leads to Sales (Create Opportunity)	Lead and appropriate workflow	Sales Employee	Opportunity

4 PROCESS STEPS

4.1 Create Target Group for Lead Generation

Use

A target group is created by using marketing attributes that are maintained for the business partners. This target group will be the basis for the subsequent lead generation process.

Procedure

1. Log on to the CRM WebClient as marketing employee.
2. Access the following activity from the navigation bar:

SAP CRM WebClient menu	<i>Marketing → Create: Segment</i>
-------------------------------	------------------------------------

3. On the *Profile Set: New* screen enter the following data and choose *Save*:

Field name	User action and values
<i>General Data</i>	
Profile Set	Customers for Lead Creation
Usage	Campaign
Deduplication Method	No Deduplication/Undo Deduplication





You need to save the profile set before you can open the Graphical Modeler.

4. From the toolbar, choose *Graphical Modeler* to open the Segment Builder Tool. Click on the empty screen to activate the segment builder if necessary.
5. On the *Attribute Lists* tab page, use the input help to select the attribute list *BP_CUST_CLASS*.
6. First of all, select the attribute value *Yes* (from the attribute *Club member*) and transfer it to the staging area (screen area on the above right hand side) using drag and drop.
7. A second attribute value, *Trade fair* (from the attribute *Attended Events*), can be placed on top of the first one also via drag and drop. The moment the attributes overlap, select option *Keep* (from the displayed options *Keep*, *Remove* and *Split*).



8. **Optional:**
In addition, you can combine the existing marketing attributes with, for example, address data attributes like *City Postal Code* (here choose, for example, attribute value *20000 – 29999*) or *Country Key* (here choose, for example, attribute value *DE*) the same way. To do this, select the attribute list *BP_CUST_ADDRESS*.
9. Right mouse-click on the new profile icon in the staging area and choose *Properties* from the dropdown list. In the *Description* field, you can change the description of the profile (for example *Customers for Lead Generation*). Make sure that the profile usage is *Campaign*.

10. Choose *OK* to confirm.
11. Save the new profile.
12. Now you are able to create the target group for your profile.
Right mouse-click on the  icon in the staging area. From the dropdown menu, choose *Build Target Group* → *In Dialog*.
13. Optional:
In order to assign new business partners who fulfill the selection criteria to your target group automatically you need to define a background job:
 - Right mouse-click in the staging area and choose *Build Target Group* → *In Background* from the dropdown menu.
 - Enter values for the field *StartTime* and if you choose to start at a later time for *Start Date*.
 - Choose *Execute Job Periodically*.
 - In the field *Period*, define how often the target group selection has to be executed.
 - Choose *Schedule Job* (F8).
14. Your target group is now created and the number of business partners contained in the target group will be displayed automatically in the staging area.
Choose *Save*.
15. If you want to display the details and all business partners listed as members of the target group, choose  *Back*.
16. In the *Target Groups* screen area, choose your new target group.
All target group details and a list of all business partners that fulfill your selection criteria is displayed.
Via *Insert* and *Delete* you can adapt the target group member list manually.
17. Optional:
If you want to check the credit information for an assigned business partner, select the name of the appropriate one.
From the work area toolbar choose *More* → *Fact Sheet* to open the business partner's Fact Sheet. In the *Credit Information* assignment block you can check the current credit limit as well as the value of open sales items.
(For details concerning the fact sheet configuration see the configuration guide of building block *B08 – Cross-Topic Functions*.)
18. Save your entries.

Result

Now you have successfully created your target group containing all business partners that are relevant for the lead generation.


4.2 Create Leads

Use

A lead can be created manually and automatically.
In this scenario, you can create leads in two ways:

- (1) Using a target group generated by External List Management
- (2) Manually, navigating directly in the CRM system.



If you want to modify the editing screen information (by adding or hiding available information / assignment blocks) when, for example, maintaining lead data, choose the button  *Personalize* and move the displayed information blocks according to your needs.

4.2.1 Create Leads for Target Group

Use

Leads for all business partners contained in the new target group *BP_TG_ELM* have to be generated.
You can skip this step if the lead generation exclusively takes place manually as described in the following chapter.

Procedure

1. In order to display the new target group and profile set with their new members, choose the following navigation option:

SAP CRM WebClient menu	<i>Marketing → Search: Segments</i>
-------------------------------	-------------------------------------

2. Choose *Search* to get a list of all profile sets and target groups and select the new target group *Customers for Lead Generation*.
3. On the *Target Group <name>* screen choose *More → Create Business Transactions* from the work area menu bar.
4. Make the following entries:

Field name	User action and values
<i>General Data</i>	
Description	BP Lead Generation (Target Group)
Transaction Category	Lead
<i>Business Transaction Data</i>	
Transaction Type	YLD
Employee Responsible	<SALES EMPLOYEE>
Start Date	<today>
End Date	<today + 1 month>
<i>Products</i>	
Product ID	<PRODUCT>

5. Choose *Create*.
6. On the *Schedule Job* screen, select start date *Immediately* and choose *Start*.
7. Choose *Back*.

Result

One lead for each member of the target group has automatically been created.

4.2.2 Create Leads Manually*Use*

Single leads need to be created manually.

Procedure

- To create a new lead in the SAP CRM WebClient user interface, access the activity from the navigation bar:

SAP CRM WebClient menu	Marketing → Create: Lead
-------------------------------	--------------------------

- Choose transaction type *BP Lead* if a selection screen appears.
- On the *BP Lead: New* screen, make the following entries:

Field name	User action and values
<i>Lead Details</i>	
Description	<any description> (e.g. <i>BP Lead 01</i>)
Prospect	<PROSPECT1>
Prospect Address	(automatically determined)
Main Contact	<CONTACT PERSON> (automatically determined)
Employee Responsible	<EMPLOYEE RESPONSIBLE> (automatically determined)
Start Date	<today>
End Date	<today + 1 month>
Notes	<any additional information about the customer contact>
<i>Parties Involved</i>	
Sales Representative	(automatically determined) Change to <SALES REPRESENTATIVE> for activating the lead to opportunity workflow

- Choose *Save*.
- In the *Products* assignment block, choose *Edit List* to maintain the following details:

Field name	User action and values
Products	
Product	<PRODUCT>
Quantity	Enter a quantity

- Choose *Save*.
- Enter a second lead *BP Lead 02* using <PROSPECT2>
- Enter a third lead *BP Lead 03* using <PROSPECT3> and additionally maintain *VIP Customers* as *Group* in the view *Classification* of the assignment block *Lead Details*.

Result

Three new leads have been created manually.

4.3 Qualify Leads

Use

Lead qualification is needed to collect further information on a customer, so that it can be decided whether the lead can be converted into an opportunity.

According to the selected transaction type (in this case, *BP LEAD*) the assigned questionnaire will be available in the lead transaction document for further qualification by an employee.

The employee responsible can also gather information on the customer and set a qualification status manually. Also, those leads that might have been created automatically from campaign execution (see scenario C39 - *Lean Campaign Management*: target group from ELM) are now qualified.

Prerequisites

You are still logged on to the SAP CRM WebClient UI as marketing employee (user MKT_EMPL).

Procedure

1. Access the activity choosing the following navigation option:

SAP CRM WebClient menu	Marketing → Search: Leads
-------------------------------	---------------------------

2. In the *Search Criteria* screen area enter, for example, the following search criterion and choose *Search*:

Search Criteria		
Lead Type	is	BP Lead




If the entry *Lead Type* is not visible as search criterion you can choose it from the dropdown box.

3. In the result list, two kinds of leads are listed:
 - Leads which were already created during a campaign execution with channel Lead Creation (after running through scenario C39 - *Lean Campaign Management*).
 - The new leads that were created in the previous step.
4. Choose the lead description to select the first newly created lead *BP Lead 01*.
5. In the *Assessments* assignment block, select the attached questionnaire *BP_LEAD_EN*.
6. Answer the questions and verify that the resulting questionnaire level is *Warm*.



Questions about	Answer
Products	Notebooks
Employees	51 – 100 employees
Units	26 – 50 units
Timeframe	3 to 6 months

7. Choose *Save*.
A new version will automatically be created for this questionnaire.

8. Choose *Back*.
9. In order to check details on account data, choose the prospect's hyperlink. From the toolbar choose *More* → *Fact Sheet*.
10. Choose  *Back* to go back to the lead.
11. As a result of the prospect's fact sheet information, the marketing employee qualifies the lead manually: In the *Lead Details* assignment block choose *Edit*.
12. Maintain the following details for lead *BP Lead 01*:

Field name	User action or value
<i>Qualification</i>	
Qualification Level	Hot
<i>Status</i>	
Status	In process
<i>Classification</i>	
Priority	Very important
Origin	Trade fair
Group	Top 100 Customers

13. Choose *Save*.
14. Choose *Back* until you get to the *Search: Leads* result list.
15. Pick the second lead *BP Lead 02* from the list.
16. In the *Lead Details* assignment block choose *Edit*.
17. Maintain the following details for lead *BP Lead 02*:

Field name	User action or value
<i>Qualification</i>	
Qualification Level	Hot
<i>Status</i>	
Status	In process
<i>Classification</i>	
Priority	Important
Origin	Trade fair
Group	New Customers

18. Choose *Save*.

Result

Based on the values you entered in the questionnaire, a questionnaire level (*Hot*, *Warm* or *Cold*) is automatically determined. In addition, you can also manually enter a qualification level as well as other lead details which may be different from the automatic value, for example, if you know the customer's selling behavior and you think that a different qualification level should be specified in this case.

The automatically generated questionnaire level still remains the same.

4.4 Rule-Based Lead Distribution (Optional)

Use

The rule-based lead distribution serves to assign business partners to leads that match the conditions of predefined lead distribution rules.

This lead distribution can be started on a regular basis when a corresponding background job has been set up. Here, the marketing employee creates a lead for a VIP Customer which later is given the Lead Qualification Level 'Hot'. Therefore, the marketing manager will be assigned as employee responsible by lead distribution.

Prerequisites

You are still logged on to the SAP CRM WebClient UI as marketing employee (user MKT_EMPL).

Procedure

1. Access the activity choosing the following navigation option:

SAP CRM WebClient menu	Marketing → Search: Leads
-------------------------------	---------------------------

2. In the *Search Criteria* screen area enter, for example, the following search criterion and choose *Search*:

Search Criteria		
Lead Type	is	BP Lead



If the entry *Lead Type* is not visible as search criterion you can choose it from the dropdown box.

3. Choose the lead description to select the previously created lead *BP Lead 03*.
4. Notice that the marketing employee (e.g. Richard Lion) was assigned to the lead as *Employee Responsible* by the partner determination procedure.
5. In the *Lead Details* assignment block choose *Edit*.
6. Enter *Hot* as *Qualification Level* in the view *Qualification* and *VIP Customers* as *Classification Group* of the assignment block *Lead Details*.
7. Choose *Save*.



Now the lead matches the conditions of the distribution rule *Dist_Rule_Imp*.

8. The lead distribution can be started in SAP GUI transaction SA38 (Report CRM_DD_BATCH) or automatically on a periodical basis in case a corresponding background job has been scheduled. The batch job has been already created during the configuration of this scenario.
9. Notice that now the marketing manager (e.g. Melanie Richard) has been assigned to the lead as *Employee Responsible* by the rule-based lead distribution.



If the marketing manager processes the lead and consequently lowers the *Lead Qualification* to *Cold*, the lead distribution rule *Dist_Rule_Reg* will reassign the marketing employee (e.g. Richard Lion) as *Employee Responsible*.

Result

The lead for a VIP customer which was qualified as hot was distributed to the marketing manager as employee responsible. As soon as the lead qualification is lowered to cold, the marketing employee is again assigned as employee responsible by rule-based lead distribution.

4.5 Transfer Leads to Sales (Create Opportunity)

Use

Leads need to be transferred to Sales (Opportunity Management) in order to create opportunities for them.

The implemented workflow automatically generates opportunities from leads according to the following rules:

- Lead is free of errors & Lead qualification level = Hot & Lead Priority = 1 (very important) & Lead Group = 001 (Top 100 Customers)
→ Opportunity is created automatically via workflow without further information of the sales employee.
- Lead is free of errors & Lead qualification level = Hot & Lead Priority <> 1 (very important) **OR** Lead Group <> 001 (Top 100 Customers)
→ A sales employee is informed by workflow and has to decide whether an opportunity needs to be created.
- Lead qualification level <> Hot
→ No workflow will be started, which means that an opportunity can only be created manually from the lead by the sales employee.

Prerequisites

At least one of the leads has reached the qualification level *Hot*.

The <SALES REPRESENTATIVE> has been assigned to partner function Sales Representative in the lead.

Procedure

1. Log on to the SAP CRM WebClient UI as sales employee Michael Curtis (SALES_EMPL) with password *welcome*.
2. Access the workflow inbox choosing the following navigation option:

SAP CRM WebClient menu	<i>Home → Workflow Tasks</i>
-------------------------------	------------------------------

3. Choose the entry *Create Opportunity from Lead for Business Partner <name>* to access the workflow task.
4. In field *Decision* you can choose between the following execution alternatives:
 - *Create Opportunity*
An opportunity is created in the background. The lead status is set to *Accepted by Sales*.
 - *Create and Display Opportunity*
An opportunity is created in the background, and a work item sent to you with which this opportunity is to be processed.
 - *Decline Lead*
The user who created the lead is informed that the lead was declined. The lead status is set to *Rejected by Sales*.
5. Select the second alternative, *Create and Display Opportunity*, and choose *Execute Decision*.
6. Go back to the CRM WebClient homepage (*Home → Workflow Tasks*).
7. A new workflow task *Opportunity <ID> created for lead* is created for the processed lead.
8. Choose this workflow task.
9. The newly created opportunity is listed in the assignment block *Associated Objects* as *BP Opportunity <ID>*.
10. Choose this opportunity for further processing of the document.



If you have installed the SAP Best Practices scenario C63 - *Opportunity Management*, you can now proceed with the Business Process Documentation of this scenario.

Result

An opportunity has been created as follow-up activity supported by workflow.

5 FOLLOW-UP PROCESS

Use

You have finished all activities that are part of the scenario described in this document.

To accomplish subsequent activities, carry out the process steps described in the referenced scenario, using the master data from this document.

In this case, those opportunities that have been generated via workflow as a result of this scenario can be further processed.

Prerequisites

A number of opportunities have been generated out of a number of leads via workflow.

Procedure

Complete all activities for opportunity processing described in the *Business Process Documentation* of the scenario **Opportunity Management (C63)**.

6 REPORTING

Use

This section describes which reports exist for Lead Management and briefly describes the content of the reports. For an overview of how to navigate within the reports, refer to the Business Process Documentation (User Guide) of the relevant Analytics scenario (Interactive Reporting or BI Reporting). The reports you will be able to view depends on which Analytics scenario you have implemented (Interactive Reporting or BI Reporting).

6.1 SAP CRM Interactive Reporting

Procedure

1. Log on to the CRM WebClient UI as BP Marketing Manager (*MKT_MAN*) if not already done.
2. In the Work Center Link Group *Reports*, you can find the available reports. Choose the report you want to display.

Reports

Lead Status Analysis:

This report shows the number of leads that end in a specific month. The leads are grouped by their status and qualification, whereby the responsible person can see which leads are urgent or require special attention.

Lead Origin Status:

This report analyzes the leads according to their status (open, lost, won,) and their qualification level (cold, hot, warm) and shows the number of leads belonging to these categories. This enables the employees to track the progress of leads. With the dropdown menu it is possible to change between different qualification levels.

6.2 BI Reporting

Procedure



Opening the reports from the WebClient UI is only possible if you have carried out all the necessary configuration steps described in the *BS4 Basic Configuration CRM Analytics* Configuration Guide.

Alternatively, you can log on to the BI system and open the business user role I15_03U. In this business user role you will find a broad range of BI reports for all areas.

1. Log on to the CRM WebClient UI as BP Marketing Manager (*MKT_MAN*) if not already done.
2. In the Work Center Link Group *Reports*, you can find the available reports. Choose the report you want to display.

Reports

From the WebClient UI the following BI reports are available for Lead Management:

Leads Won and Lost Report: This query describes the actual number of open, won, and lost leads for a selected time period.

Lead Duration Report: This report is based on the Leads Won and Lost Report with a filter on the report duration.

Lead Origin: This report displays the number of leads by lead origin.

Lead Status: This report displays the number of leads by status.

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