

# Crosscan CRM Workflow

## 1. Creation of an overview page for tracking leads from various sources:

- Detection and tracking of website visitors (currently via Pipedrive / Dealfront)
- Contact forms (can be created within Pipedrive and tracked once integrated into the website)
- Downloads through forms (flyers, brochures, white papers)
- Inquiries via email (manual entry into CRM?)

## 2. Processing of leads upon receipt (only Sales-Qualified Leads)

- Automatic assignment of leads to the respective sales representative
- Automatic email sequence to the lead upon inquiry
- Individual assignment options based on criteria such as industry, budget, interest
- Option for lead scoring based on importance
- Ability to tag leads/customers with labels such as Warehouse Security, Video, People Counting, or Customer, Former Customer, Partner, Supplier, etc.
- Automatic matching with CRM/ERP to determine if the lead is a new or existing customer
- Optional deletion of new leads and associated organizations and contacts using manual tags to reduce data overflow (e.g., [asdf@asdf.com](mailto:asdf@asdf.com))
- Follow-up reminders for sales representatives regarding offers or follow-up actions
- Integration with existing Outlook or MS-365 system for further customer communication -> additional tracking for whether the email was read and how often it was opened
- Logging of conversations (via notes?)

## 3. Creation of an overview of the lead pipeline by sales stages – currently, the process in Pipedrive is represented as follows and should be continued:

1. Deal In
2. Qualified
3. Budgeting
4. Test / POC
5. Initial Commercial Order
6. Commercial Refinement & Negotiation
7. Verbal Order
8. Formal Order
9. 365
10. On Hold

## 4. Additional Features

- Linkage with ERP, accounting, order processing, etc.
- Potential integration of other important information for sales and accounting (e.g., planned expansions, impending bankruptcies, payment difficulties, etc.)
- Odoo Marketing Tools:
  - Reporting of incoming leads and tracking of marketing campaigns (including source tracking from landing pages, newsletters, or social ads -> possible via UTM parameters?)
  - Odoo Email Marketing for automated mailings after newsletter subscription (including unsubscribe option); consideration of classification