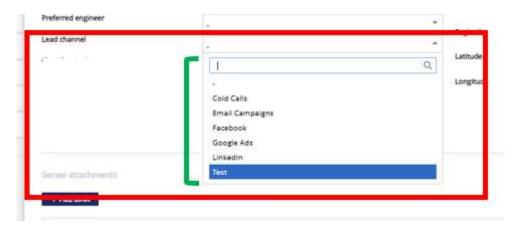
# **Prospect Management: Lead Channels**



# **Prospect Management: Lead Channels**

40521 As an FSP Portal user, I want to manage Lead Channel master data so I can maintain valid sources for prospect origination Done



## Description

• For every Prospect—and optionally for each Customer—it is required to specify the origin of the lead, such as **Website Form, Trade Show, Referral, or Cold Call**. The list of available lead sources is maintained within the system's master data.

#### Value

#### **Know Which Marketing Channels Deliver Results**

- Increases transparency of marketing channels
- Track exactly where your best leads come from. Customize lead sources to match your specific marketing efforts—trade shows, referrals, web forms, or industry-specific channels.
- Perfect for manufacturers and construction services needing to maximize ROI on marketing investments.

#### **Gomocha Pillars**

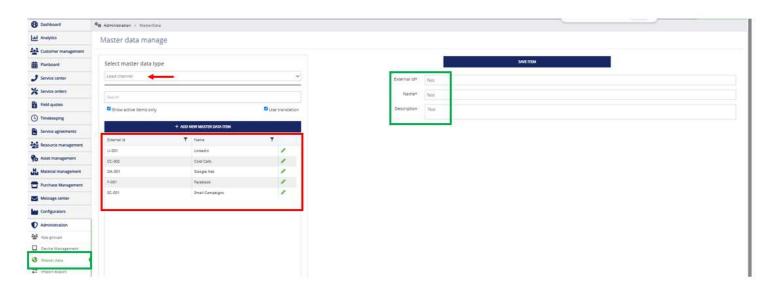
- **Efficiency**: Standardizes lead source tracking to reduce data inconsistencies and manual follow-ups.
- **Flexibility**: Supports dynamic business needs by allowing easy updates to lead source options in the master data.

- **Enablement**: Gives teams better insight into lead generation channels to inform sales and marketing strategies.
- **Performance**: Improves reporting accuracy and supports better decision-making through consistent data collection.

#### Main Flow/Use Steps & Output

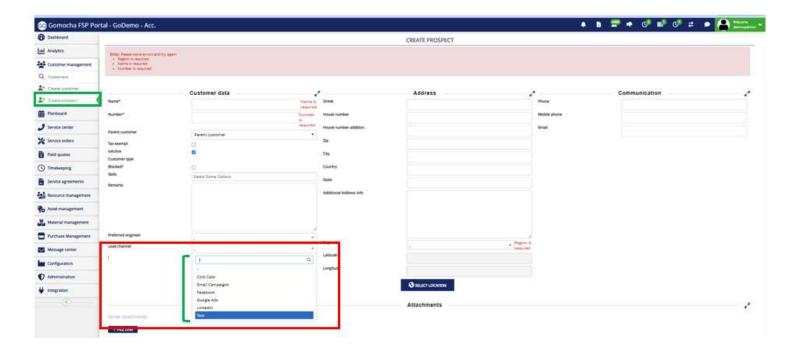
#### Create or View Lead Channels in Master Data

- 1. From the Gomocha FSP Portal: User selects Administration > Master Data.
- 2. From Master Data page User selects entity Lead Channel from the drop-down list
- 3. **System** shows Lead Channel overview (all active lead channels)
- 4. To create a new Lead Channel **User** clicks +Add New Master Data button.
- 5. **System** shows new Lead Channel creation screen with the fields.
  - o Id
  - Name
- 6. **User** completes the form and clicks **Save.**
- 7. **System\*\*\*\*validates data**, assigns **status Active**, **Created By** and **Creation Date**, and refreshes the Lead Channel overview.

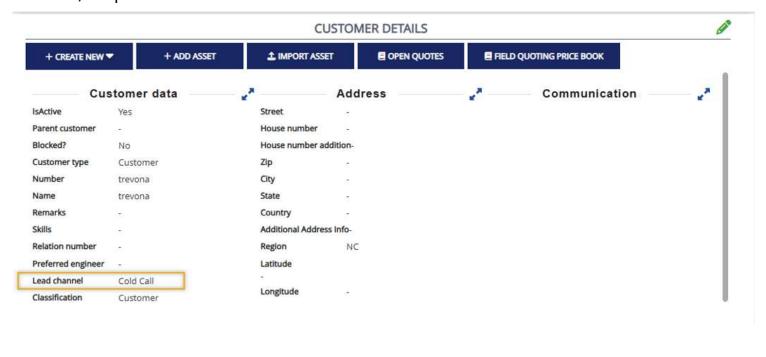


## Selecting/Using Lead Channels

- 1. Follow the standard procedure for registering a new Prospect.
- 2. On the Create Prospect screen, the user should locate the Lead Channel field.
- 3. From the **dropdown menu**, the user can select an existing lead source or choose from any newly created lead channels.
- 4. Complete the prospect registration and **save** the record.
- **Note:** If the **Lead Channel** field is not visible, it must be added via the **Portal Layout Configurator**.



## **Customer/Prospect Details Screen**



# Reporting

New SSRS report - Prospect management - rate conversion from prospect to customer

