

Why Are Leads Lost?

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During my prior work with Unified Leads and Transactions (please read this blog to understand how to get access to these datasets - <https://coxautoinc.sharepoint.com/sites/IMS-Architecture/SitePages/My-Data-Analytics-Journey-at-Cox-Automotive.aspx>) I was able to obtain and curate some of these data sets. To add to that, since I posted the earlier blog, data is now available from CADS group directly in Snowflake Data warehouse, which is a much more performant and easier means of access. Being (comparatively) new to the company, I wanted to understand the main reasons why Leads are lost and do not become Transactions.

The Dataset

The Unified Leads dataset is described here in Collibra - <https://cai-prod.collibra.com/asset/e53b63d4-6575-41e1-b643-f55c92098c46>. This dataset may be used to understand customer interactions with dealers over various channels like phone, visits, email etc. These observations were made on data refreshed on 4/30/2020.

Understanding Leads

This dataset contains multiple tables, and I focused on the main table UNIFIED_LEADS_ALL. The columns of interest here for examining leads are:

- CRNT_LD_STS : Current Lead Status – values like No intent to buy, Out of market, Pending etc.
- CRNT_LD_STS_TYPE: Current Lead Status Type – values like Bad, Lost, Sold etc.
- VIN: Vehicle Identification number of vehicle
- INVTY_TYPE: Inventory Type – values like Used, New, CPO, Wholesale etc.
- LD_MEDIA_TYPE: Lead Sources – values like Phone, Internet, Walk-In etc.

Note: While I used inventory type in queries as I wanted to see New/Used/CPO breakdowns, for this quick analysis, it did not make sense to further categorize by that field.

Here is the SQL used to aggregate the Leads data, filtered for 2019, valid VIN and Retail leads only (no wholesale), in

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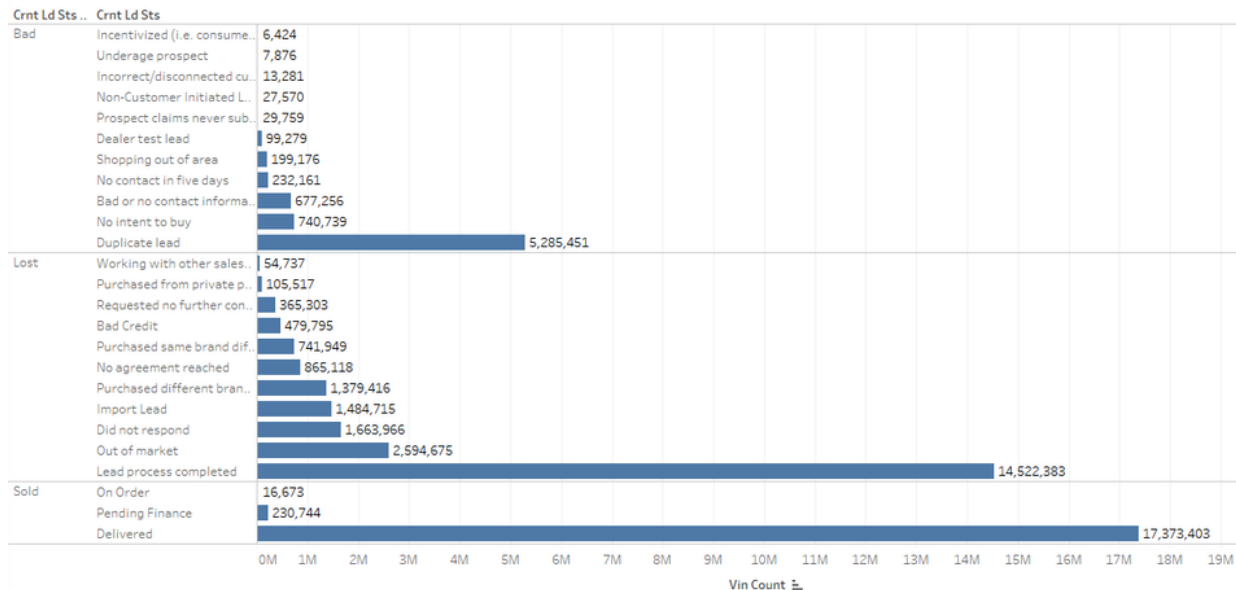
1 select COUNT(VIN) VIN_COUNT, CRNT_LD_STS, CRNT_LD_STS_TYPE, INVTY_TYPE
2 from "DP"."CADS_UNIFIED_LEADS"."UNIFIED_LEADS_ALL"
3 WHERE (LST_UPDT_DT LIKE '2019-%')
4 AND (VIN regexp '[A-HJ-NPR-Z0-9]{17}')
5 and CRNT_LD_STS_TYPE in ('Bad', 'Lost', 'Sold')
6 and INVTY_TYPE in ('New', 'Used', 'CP0')
7 group by CRNT_LD_STS, CRNT_LD_STS_TYPE, INVTY_TYPE
8 order by VIN_COUNT desc

```

The data (75 rows) were extracted as a csv file and used with Tableau Desktop.

Observations

Retail Leads by Status - 2019



Looking at the most prominent numbers, leads that had a status of “Sold” and “Delivered” were around 17.7 million. Leads classified as “Bad” and “Duplicate Lead” were around 5.25 million. While this number is high, it makes sense to some level, as leads can come from various sources and should not be counted multiple times. However, the leads classified as “Lead process completed” at around 14.5 million seemed rather large and did not provide enough explanation.

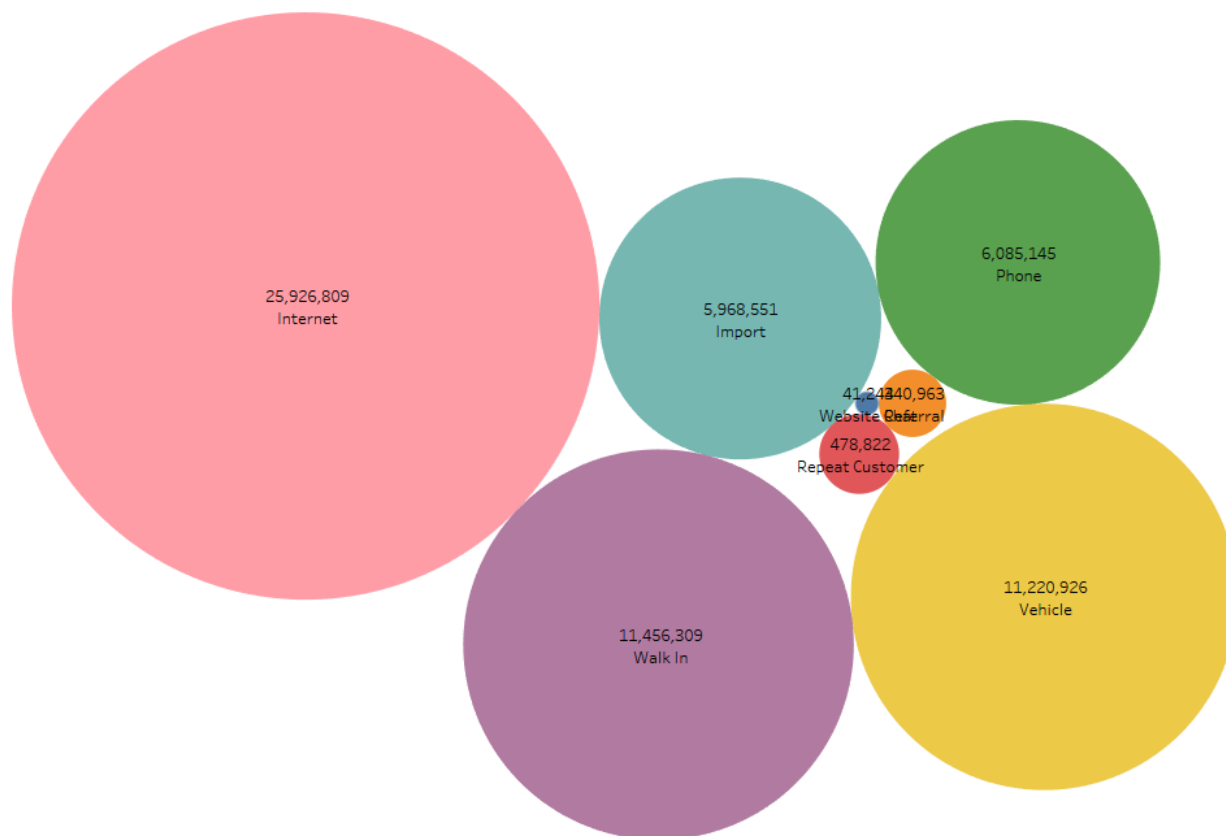
The following query was executed to understand what lead sources are being utilized.

```

1 select COUNT(VIN) VIN_COUNT, LD_MEDIA_TYPE, INVTY_TYPE
2 from "DP"."CADS_UNIFIED_LEADS"."UNIFIED_LEADS_ALL"
3 WHERE (LST_UPDT_DT LIKE '2019-%')
4 AND (VIN regexp '[A-HJ-NPR-Z0-9]{17}')
5 and INVTY_TYPE in ('New', 'Used', 'CPO')
6 group by LD_MEDIA_TYPE, INVTY_TYPE
7 order by VIN_COUNT desc

```

Retail Leads by Media Type - 2019



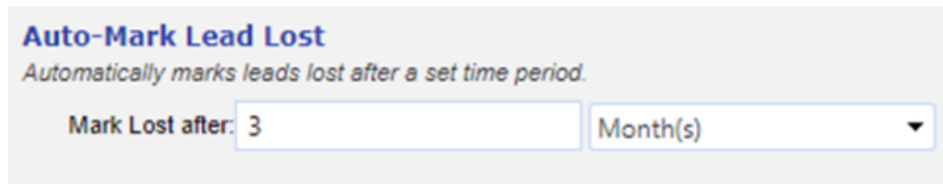
The above visualization explained the possibility of lead duplication, but still did not elucidate the "Leads process

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Findings

Next, I reached out to Colibra Data Contacts and was connected to the Business Unit contacts at Vin Solutions, which is another validation for how well the Data Cataloging process works on the CADS – Enterprise Data Platform.

Vin Solutions experts explained to me that there is a default setting in the software called “Auto-Mark Lead Lost” that is set to 90 days. When a dealer has this enabled and the lead hits their configured time frame the system will mark it lost and set the reason as “lead process completed”. This automated method enables System Operators to not classify every leads appropriately when it fails for any reason (knowing the system has their back), so we may be losing valuable data that could be gathered and help us understand the reason for such a big percentage of leads lost.

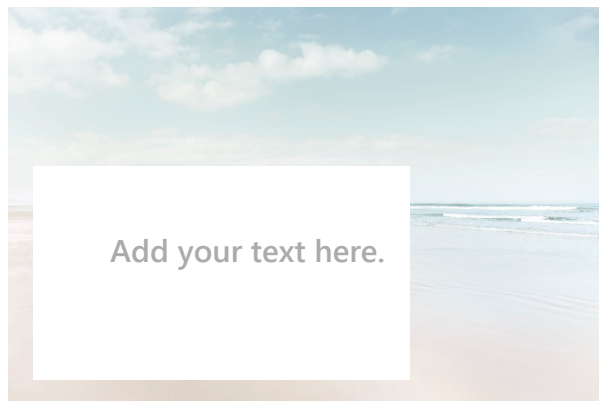


I had a few thoughts, not knowing anything about the system or the feasibility of these changes 😊 :

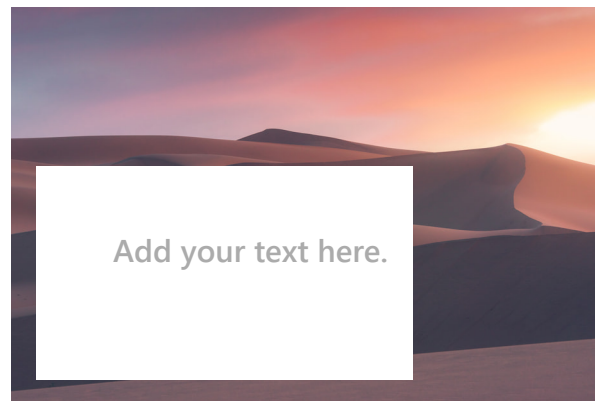
1. Provide a message back to the System Operator to notify them of their Leads that are coming up on the “Auto-Mark Lead Lost” timeframe and provide them ability to edit the status.
2. Notify the Supervisor if a large percentage of Leads (for an operator) are being system set to this status (I would imagine this information would be valuable to the Dealers too).
3. Allow a smaller window for this default, like 30 days, with an option to extend with notification and approval (from System Operator) – maybe a way of keeping the lead “fresh” in their minds.

What do you think may be solutions to this problem of losing valuable data? Maybe if we have enough innovative ideas, we can provide some feedback to Vin Solutions team.

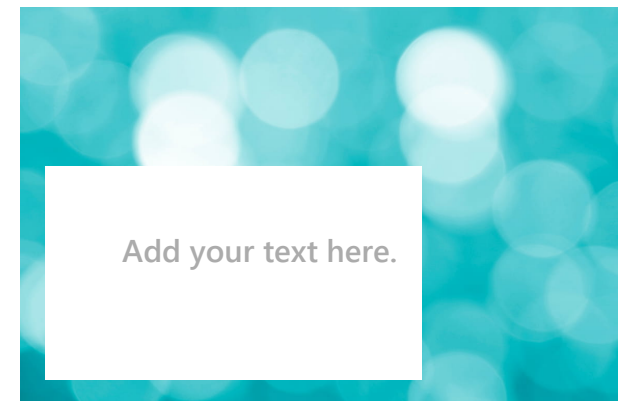
Once again, thank you for reading my blog.



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