Lead & Opportunity management Exercises Book

English Version

Case Study introduction

You are managing a company who produces t-shirts and other clothes. During your journey in this training, you'll build your instance in order to make this enterprise a real success.

Topics covered:

1. Sales activities.
2. Leads.
3. Opportunities.

Exercise Difficulty level:

- (*) Easy
- (**) Average
- (***) Advanced

Access our online doc:

https://www.odoo.com/documentation/user/11.0/crm.html

Case Study CRM

As sales manager, you want to implement customer followup. You are looking for a business application enabling your sales team to better manage sales flow and boost contacts with potential customers. Your sales team need to be able to:

- *Register information requests from customers.*
- *Contact the customers in order to process the requests and keep track of them.*
- *Gather relevant customer data.*
- *Followup and manage sales activities of your teams.*

1. Sales activities

   a. Define your Activity types (*)

   ‘Next Activities’ are very useful when it comes to communicate with your colleague or organize your todo’s in order to get things done.

<u>Exercises</u>

A. Create 3 new activity type:
   1. Internal meeting
   2. Validate by Manager
   3. Move to next stage

B. Create a Recommended Next Activities Chain

b. Define Sales Funnel (*)/(**)

A well structured sales pipeline is crucial in order to keep control of your sales process and to have a 360-degrees view of your leads, opportunities and customers.

<u>Exercises</u>

A. Setup stages as such for the default 'Sales' Channel:

1. NEW: Prob. 0%
2. ASSIGNED: Prob. 0%
3. 1st CALL: Prob. 10%
4. PROPOSAL: Prob. 50%
5. DECISION MAKERS: Prob. 90%
6. WON: Prob. 100%
7. CLOSED: Prob. 0%

B. Create a new Sales Channel and his related sales funnel:

Create stages you would use in your own company.

Note: create stages that are only used for this new channel !

2. Leads.

   a. Encode/import your first Lead (*)/(**)

<u>Exercices</u>

A. You are participating at a Fitness venue. There you received a lot of business cards. It's time to enter those data. Enter Manually next business card.

B. You collected so much business card that you decide to make an import file. Go have a look at the Lead list view and try to import some basic fields. (**)

3. Opportunities (**)

<u>Exercices</u>

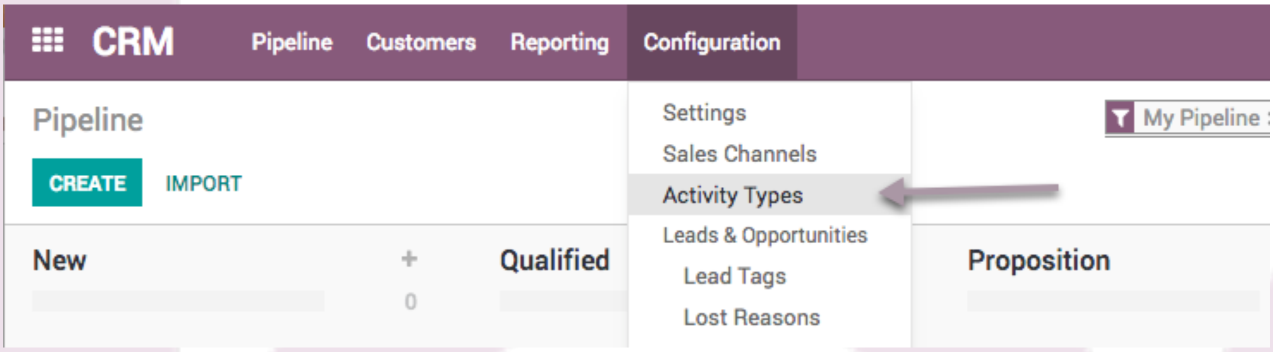
A. ’Fitforyou’ is interested in branded t-shirts for his Health center. We speak about 500 t-shirts in different sizes and colors. Fitforyou has a budget of 5000$.
It’s time to covert this lead into an opportunity and get to action in order to win this deal.
Fitforyou contact person is Mr Vandamme (Use your own created mail account for communication: if you don’t have one, make a Gmail account).
At the end, 2 calls and 1 meeting where registered to close the deal.

Note: Keep the opportunity open to create you offer in the next exercises.

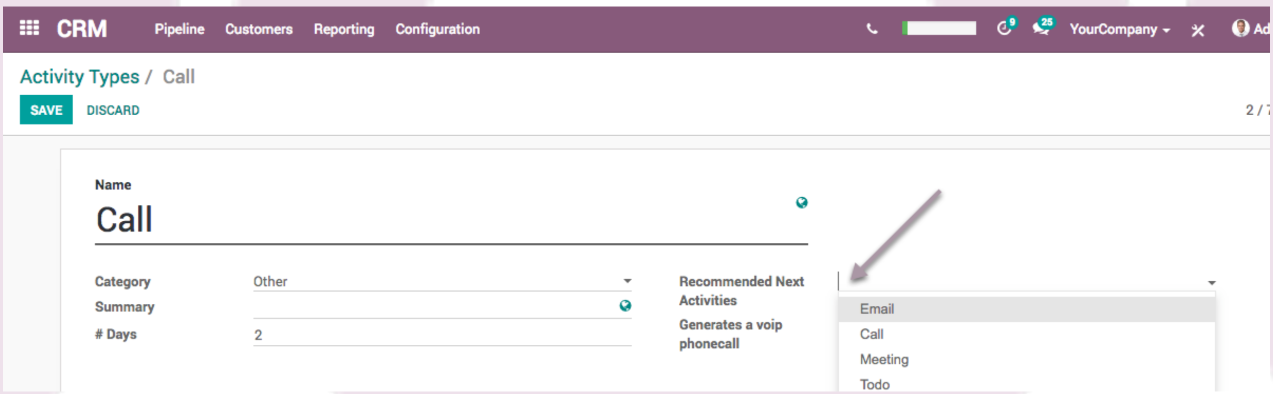
<u>Some help regarding exercises.</u>

1. Sales activities
   a. Define activity types (*)

A. Where to define ‘Activity Types’?
- Configuration -> Activity Types



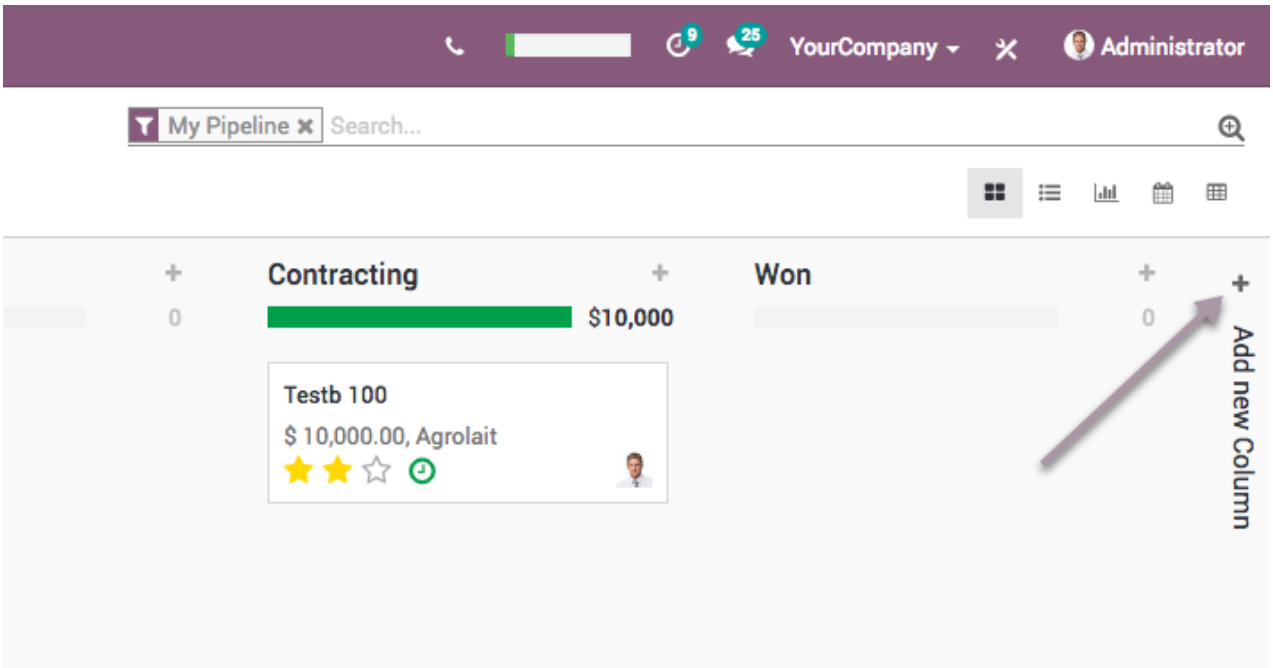
B. How to create Recommended Next Activities ?



b. **Define Sales Funnel (*)/(**)**

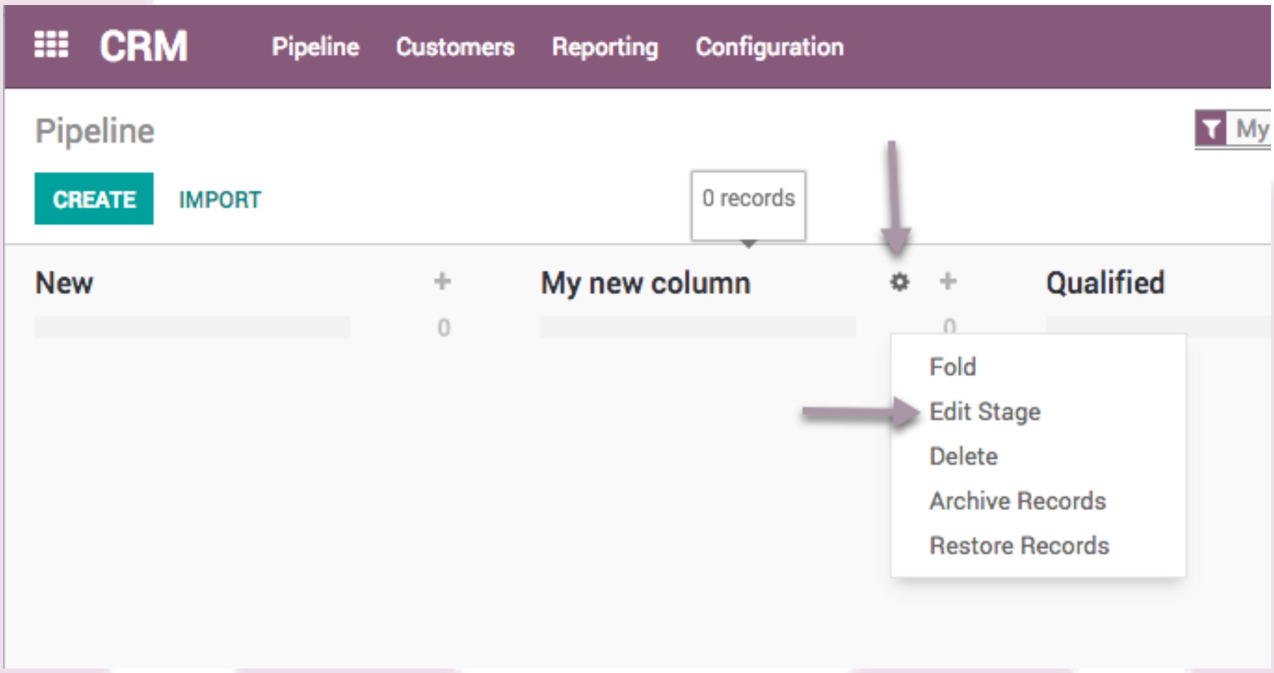
A. **How to setup stages?**

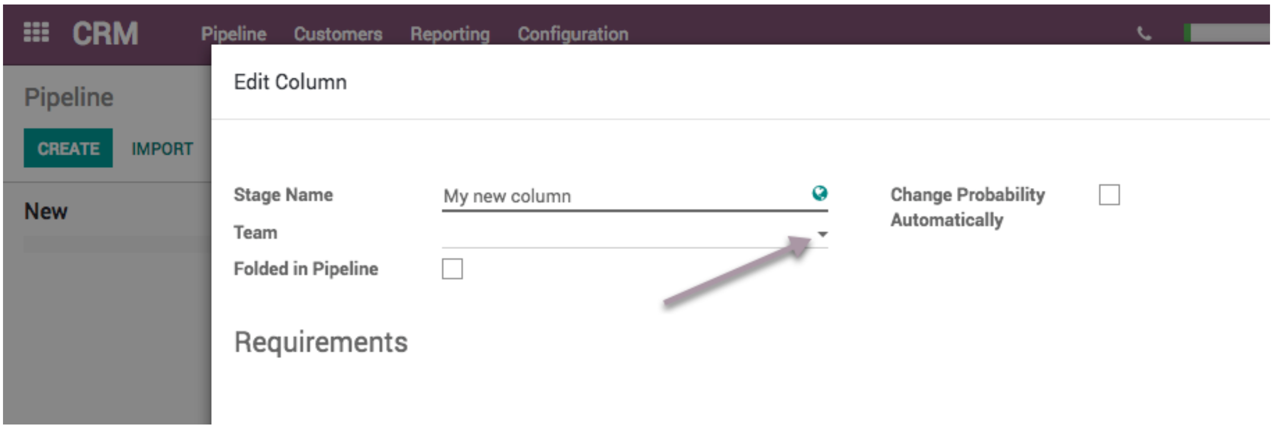
- Click ‘Add new column’
- enter name and hit ‘enter’ or click ‘add’



B. **How to make stage visible for a specific sales channel?**

- Open ‘Edit Stage’ from the setting icon in the column
- Select Team

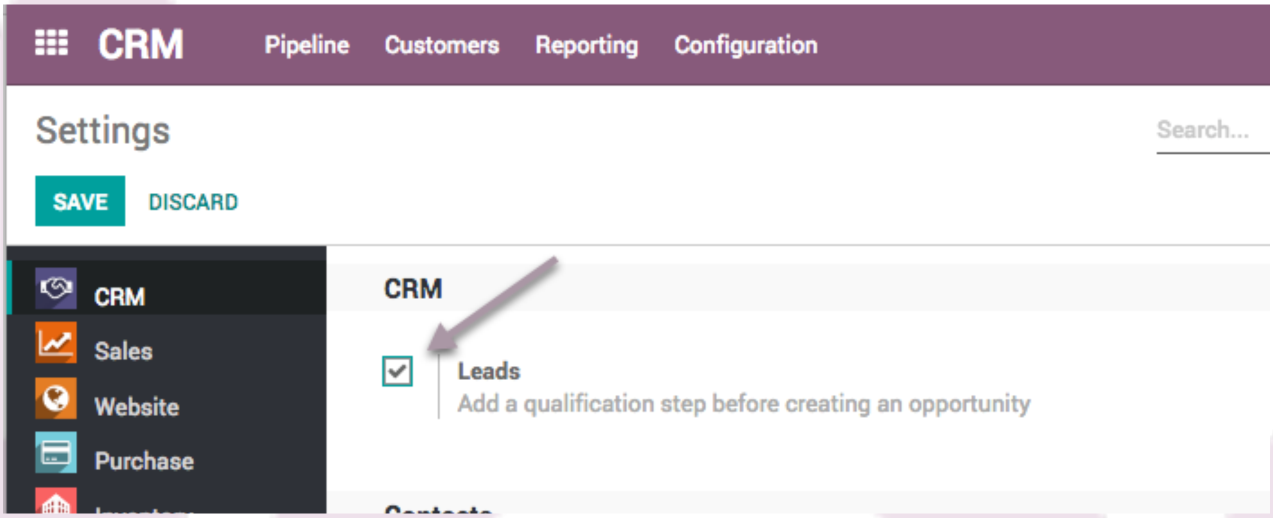




2. Lead:

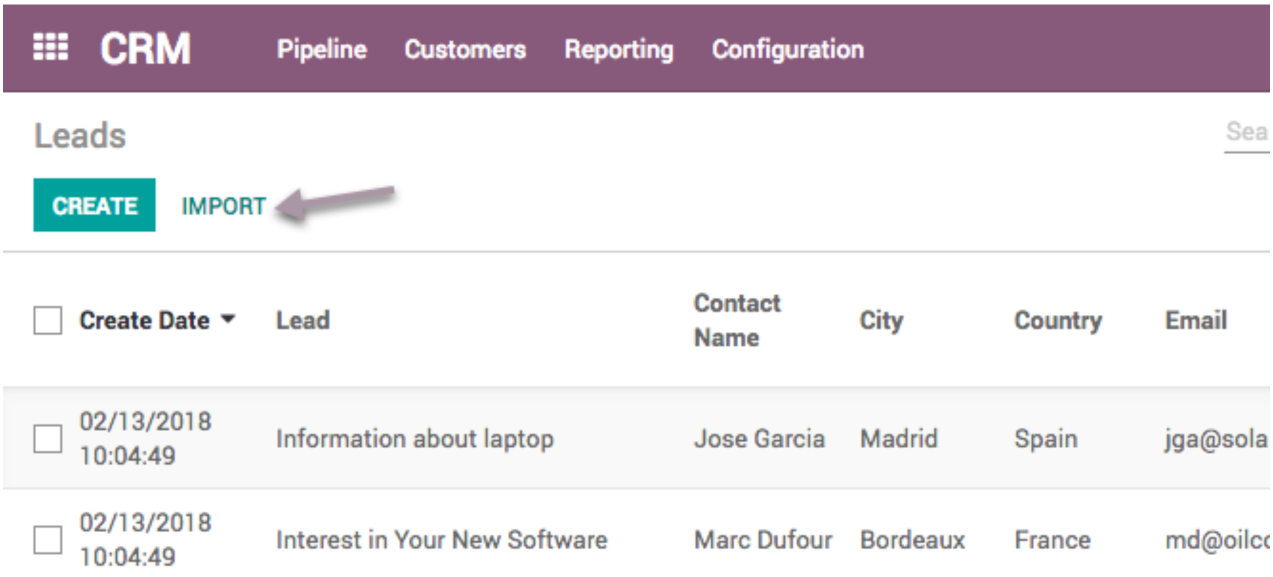
A. Manually enter a Lead (*)

- Configuration -> Settings
- Activate the use of Leads
- Pipeline -> Leads
- Click 'Create', enter data



B. **Import Leads**

- From the list view, click ‘Import’
- Upload your file
- Click ‘Test Import’ to controle your file
- If ok, click ‘Import’



3. Opportunities

A. **Convert Leads to Opportunity**

- Start from a lead
- from the form view, click ‘ Convert to Opportunity’