# Lead Management

Lead management involves capturing, tracking, nurturing, and converting potential buyers into actual customers. It ensures efficient follow-ups and improves sales performance.

### **1. Capture Leads from Social Media, Website, and Ads**

* **Purpose:**
  + Centralize all leads from various sources (social media, website, and ads) into a CRM system.
  + Ensure no potential buyer inquiry is missed.
  + Improve response times and increase conversions.
* **Success Criteria:**
  + Higher lead-to-conversion ratio.
  + Reduced lead leakage and missed follow-ups.
  + Faster response times to buyer inquiries.
* **Skills Required:**
  + CRM setup and integration.
  + API and automation workflows.
  + Data entry and management.
* **Related Online Tools:**
  + **HubSpot CRM / Salesforce** – For lead tracking and automation.
  + **Zapier / Make.com** – For integrating leads from social media ads to CRM.
  + **Google Sheets / Airtable** – For manual lead tracking.
* **Best Practices:**
  + Ensure all lead sources **(Facebook, Google Ads, WhatsApp, website forms, offline events)** are integrated into a **single CRM**.
  + Automate lead notifications to the sales team for **immediate follow-up**.
  + Segment leads based on **budget, location preference, and urgency**.
* **Example:**
  + **Before:** Leads manually collected from multiple platforms, leading to **delayed responses and missed opportunities**.
  + **After:** Leads automatically **captured, tagged, and assigned** to sales agents via CRM, improving response rates.

### **2. Qualify Leads Using AI-Driven Scoring**

* **Purpose:**
  + Prioritize high-intent buyers by scoring them based on their engagement and behavior.
  + Reduce time wasted on low-intent or unqualified leads.
  + Improve the efficiency of sales teams by focusing on potential conversions.
* **Success Criteria:**
  + Higher close rates due to better lead prioritization.
  + Increased sales efficiency with reduced follow-up on unqualified leads.
  + Improved allocation of sales team resources.
* **Skills Required:**
  + Data analysis and AI-based scoring.
  + CRM configuration and automation setup.
  + Buyer behavior tracking and analysis.
* **Related Online Tools:**
  + **LeadSquared / Pipedrive** – For CRM and lead scoring automation.
  + **Salesforce AI Einstein** – For AI-driven lead prioritization.
  + **Google Analytics / Hotjar** – To track user behavior.
* **Best Practices:**
  + Assign **lead scores based on interactions** (e.g., clicks on ads, time spent on listings, repeat visits).
  + Segment leads into **hot, warm, and cold categories** for efficient follow-up.
  + Automate priority **alerts for high-score leads** to ensure immediate action.
* **Example:**
  + **Before:** Sales teams followed up with **all leads equally**, wasting time on uninterested buyers.
  + **After:** AI-based scoring identifies **high-interest buyers** (visited property page 3 times, engaged on WhatsApp), leading to a **higher conversion rate**.

### **3. Automate Follow-Up Emails, SMS, and WhatsApp Messages**

* **Purpose:**
  + Maintain engagement with leads who are still considering their options.
  + Provide timely reminders and personalized offers.
  + Increase the likelihood of conversions through regular touchpoints.
* **Success Criteria:**
  + Higher re-engagement rate from dormant leads.
  + More site visit bookings and inquiries.
  + Increased overall conversion rate.
* **Skills Required:**
  + Email marketing automation.
  + Copywriting for personalized communication.
  + CRM and chatbot integrations.
* **Related Online Tools:**
  + **Mailchimp / HubSpot** – For email automation.
  + **Twilio / Wati** – For WhatsApp and SMS automation.
  + **ActiveCampaign** – For personalized lead nurturing sequences.
* **Best Practices:**
  + Send **personalized follow-ups** based on user behavior (e.g., “You recently checked out our 2BHK apartment, would you like to book a visit?”).
  + Time follow-ups strategically **(e.g., reminder emails 2 days after inquiry, WhatsApp follow-up after 1 week)**.
  + Include **offers, testimonials, and success stories** to boost trust.
* **Example:**
  + **Before:** Leads forget about the property after initial contact.
  + **After:** Automated **email + WhatsApp follow-ups** increase site visit bookings by 35%.

### **4. Sync Lead Details with CRM & Assign to Sales Agents**

* **Purpose:**
  + Ensure every lead is assigned to the right sales agent for quick follow-up.
  + Keep track of each lead’s journey and prevent loss of potential buyers.
  + Streamline team coordination for better conversion rates.
* **Success Criteria:**
  + Faster lead response times.
  + Higher lead conversion rates.
  + Clear tracking of each lead’s status.
* **Skills Required:**
  + CRM management and configuration.
  + API integrations and automation.
  + Sales coordination and workflow setup.
* **Related Online Tools:**
  + **HubSpot CRM / Zoho CRM** – For lead tracking and assignments.
  + **Slack / Microsoft Teams** – For internal team notifications.
  + **Zapier / Make.com** – For automation between CRM and lead sources.
* **Best Practices:**
  + Automatically **assign leads based on location, property type, and budget**.
  + Set up **reminders for sales agents** to follow up within a set time (e.g., within 1 hour).
  + Maintain **a clear pipeline (New, Contacted, Site Visit Scheduled, Closed, Lost)** for better tracking.
* **Example:**
  + **Before:** Leads were manually assigned, causing **delays and loss of hot leads**.
  + **After:** Leads are **automatically assigned in CRM** and notified to sales agents, reducing **lead response time by 50%**.

### **5. Track Lead Engagement and Generate Reports**

* **Purpose:**
  + Measure how engaged each lead is and analyze which sources perform best.
  + Adjust marketing and sales strategies based on real-time data.
  + Identify bottlenecks in the lead conversion process.
* **Success Criteria:**
  + More insights into lead behavior and preferences.
  + Better allocation of resources to high-performing lead sources.
  + Data-driven decision-making to improve conversion rates.
* **Skills Required:**
  + Data analytics and reporting.
  + CRM dashboard customization.
  + Performance tracking and sales forecasting.
* **Related Online Tools:**
  + **Google Analytics / CRM Dashboards** – For tracking lead behavior.
  + **Power BI / Tableau** – For advanced data visualization.
  + **Facebook Pixel & Google Tag Manager** – For tracking online engagement.
* **Best Practices:**
  + Track metrics such as **response time, lead quality score, conversion rates**.
  + Identify **drop-off points** where leads lose interest.
  + Adjust campaigns based on insights (e.g., **increase retargeting for leads who visited but didn’t inquire**).
* **Example:**
  + **Before:** Marketing teams lacked data on which ads were working best.
  + **After:** Reports show that **Google Ads generated higher-intent buyers than Facebook Ads**, allowing better budget allocation.