FD - P22. Lead Management

Version Control

Version	Date	Description	Author
v.1	22.10.2018	Creation	Laura Theolier
v.2	14.12.2021	Update Iboost 2021 full process refactoring	Clémence Rovelon
v3	14.10.2024	Leads and Samples Management Optimization project (IT12781)	Susana Alves Simona Croituru

Reference Documents

User Guide	https://wiki.solvay.com/display/ISAPPSUP/P22.+Lead+Management
Iboost 2021 Playbook	https://docs.google.com/presentation/d/1FYPGOGDnOH-ze2H6GBPTtT2bjL5U7xMHxlRKWFO5UnQ/edit#slide=id.g100e5bdb64a_0_0
Technical Documentation	https://docs.google.com/document/d/1M4elYzaycNBmc1FWQVgQI0VMZJSXUpNwabzSpTzooJU/edit
GBU Queues Management	https://docs.google.com/spreadsheets/d/19K7gRwE9EqTYahpUkKEZ2eJAsUzhONdx8OptG3aFgHI/edit#gid=1125870162
Web-to-Lead Mapping	https://docs.google.com/spreadsheets/d/1BgjYDyJ8JZqAfqvDTUYLA8bDFr_PveF9gpSGbCR4ckQ/edit#gid=0
Pardot Documentation	
Leads & Samples Project - Leads Features Overview	https://docs.google.com/presentation/d/1641IMiyC9jxNQVks1KjSv5O7JE85yAA67CNUD72CDt8/edit#slide=id.g20de9488a45_0_154
Leads & Samples Technical Documentation	https://docs.google.com/document/d/1RamJGEk0Z9DJ665HLwzd6AzwxiUPY-cGsV30gcJJzWE/edit

1. Functional Process

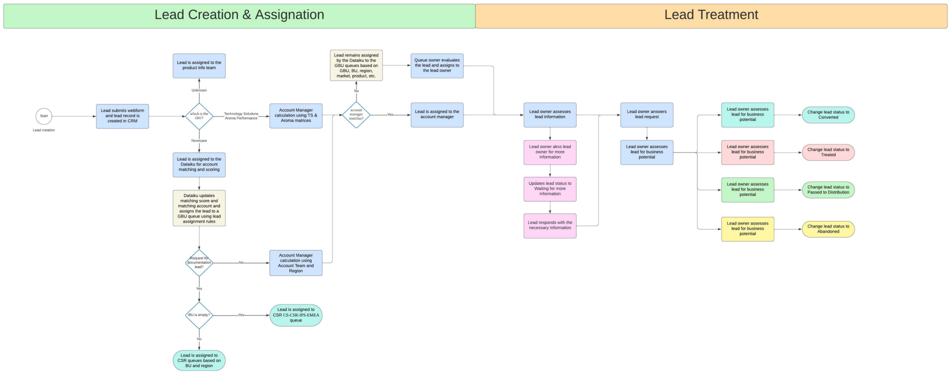
Process Overview

What is a Lead?

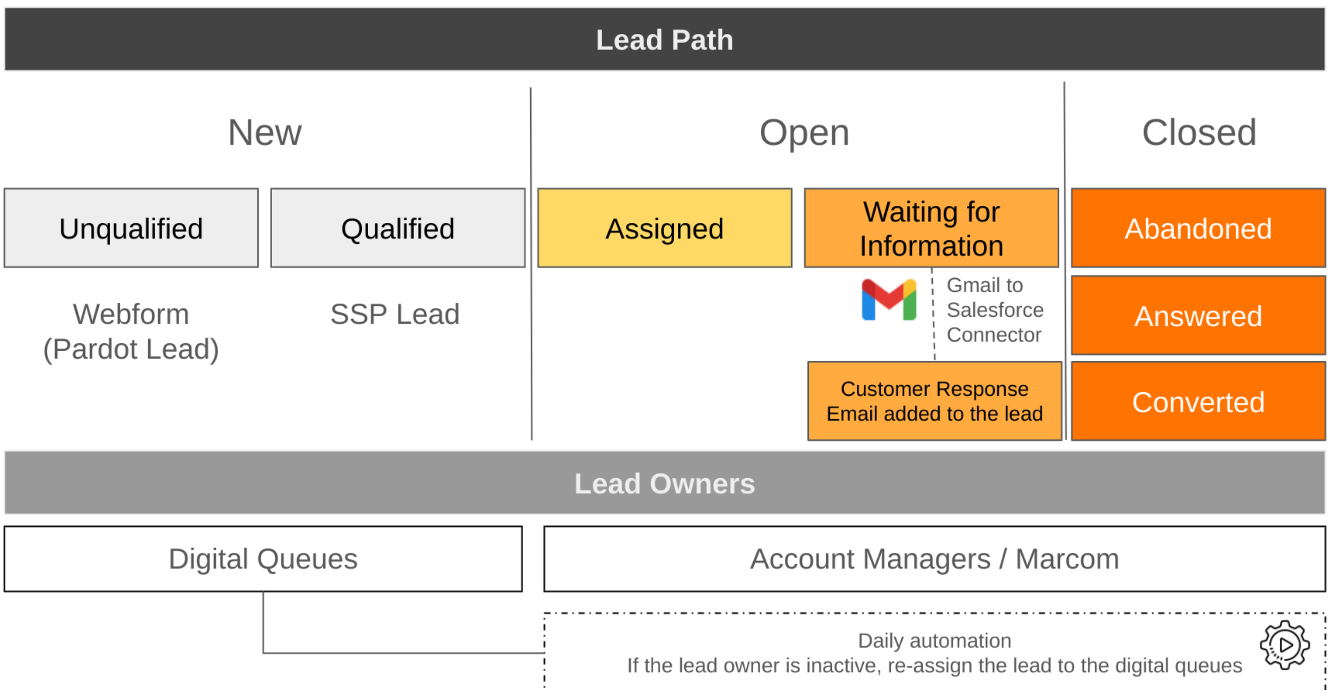
- Each Lead is a person with a request for information from Solvay. They are a mix of existing customers, new contacts from existing accounts, distributors, universities, new prospects and people looking for something we don't offer.

Why is lead management important?

- Solvay reputation: ~23k leads have interacted with our lead management process in 2021
- Customer experience: ~2% are existing customers and ~40% are new contacts from existing accounts
- Lead volume is increasing: +30% compared to 2020
- Revenue: in iCare we have been able to link Leads to opportunities and have identified ~31M€ over next 5 years (average 6M€ per lead treated)



Leads that enter into iCARe (via Salesforce-to-Salesforce connector) are following the path below:



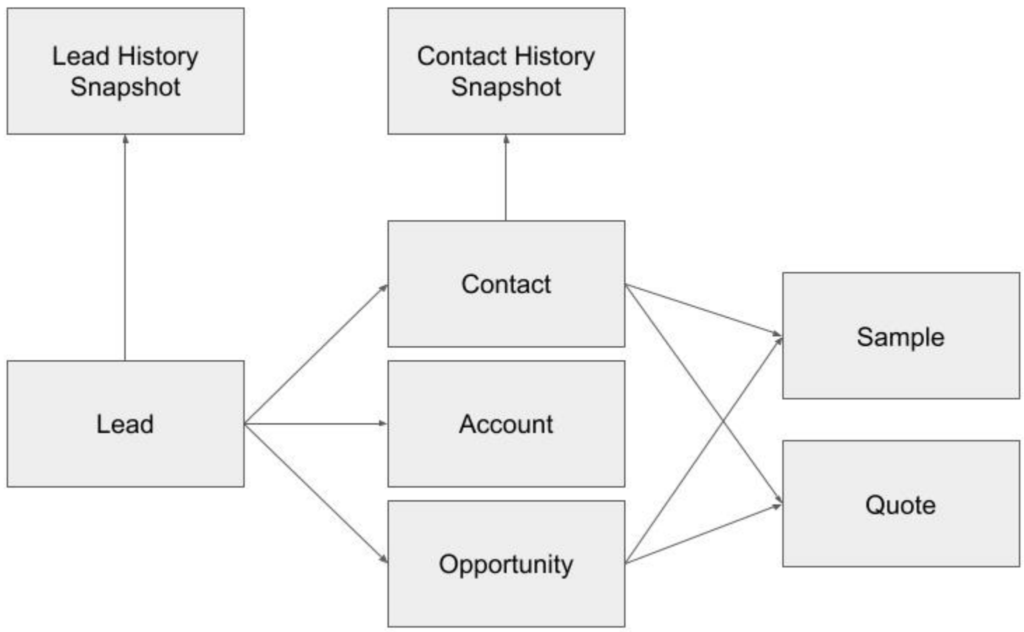
Use cases

Lead Creation	The process of stimulating and capturing a potential interest of a company in a Solvay solution. The lead could be created without GBU and/or BU
Lead Assignment	There are 2 cases (depending on the information selected/registered on the source, or depending on the information completed during manual creation) • If the GBU is identified, it is assigned to the GBU queues • If the GBU and/or Product are not identified, the Customer Information team will check the case and transmit the lead to the GBU contacts
Lead Qualification	Sales qualification : The process of evaluating and nurturing a lead in the preparation of a potential conversion

Lead Closure	A closed lead can be : • Passed to distribution : Volumes are too small for direct sales • Treated: reply sent to the customer but the lead is not converted, OR, lead has been assigned to the GBU Specialty Polymers and was sent to iCare • Abandoned: poor interest of the lead, which is abandoned • Converted: answer is sent to the customer, and lead is converted into an account, contact and/or Opportunity

2. Data Model & security

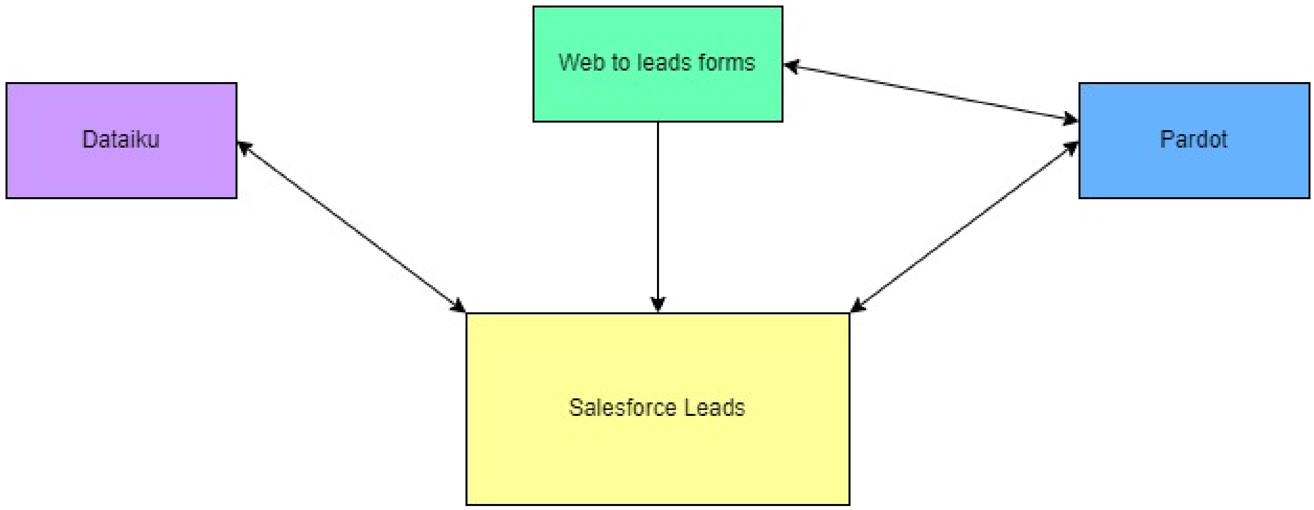
Main objects



We are using the standard lead conversion process into Contact, Account and/or opportunity. The lead is not deleted from the system but is no longer searchable, unless your admin assigned you the View and Edit Converted Leads permission." The new account, contact, or opportunity record created from the converted lead is searchable.

To open a sample or quote, it could be done from Contact or Opportunity related leads. If the contact and/or the opportunity has been created from a lead, the quote or the sample creation will be helped with data repository from the source lead.

Interfaced third parties



Leads are interfaced with multiple Solvay Websites via web to lead on drupal forms. A customer accesses solvay.com website and navigates to the Product Finder. (this is the link for Solvay.com, the form are also available from countries sites)

The customer selects a product to check product details, and contacts Solvay using webforms to :

- request a sample
- request a quotation
- ask for documentation
- ask a product inquiry
- Ask a generic inquiry

Pardot is generating leads via marketing campaigns and fields like opt ins are interfaced both ways between two systems.

Dataiku is interfaced since 2021 to match existing accounts based on email domains.

Lead Security Model

Who can create?	Solvay.com website automatically creates leads Internal user is allowed to manually create leads
Who can see?	Any user belonging to the QUE-Webform public group can see all leads
Who can update?	Any user belonging to the QUE-Webform public group can update any lead
Who can delete?	A Lead cannot be deleted. Only the System Administrator (SBS) can delete a Lead

3. Lead Management

Lead Sources

Leads on Core CRM are coming from **two main sources** :

Pardot (Specific documentation to come) : all Pardot leads will go to 'Unqualified' Status

Web-to-lead :

Domain	Business forms	Type in CRM
Solvay.com	Product inquiry filtered	Product Inquiry
Solvay.com	Request a quotation	Quotation request
Solvay.com	Solution inquiry	Generic question

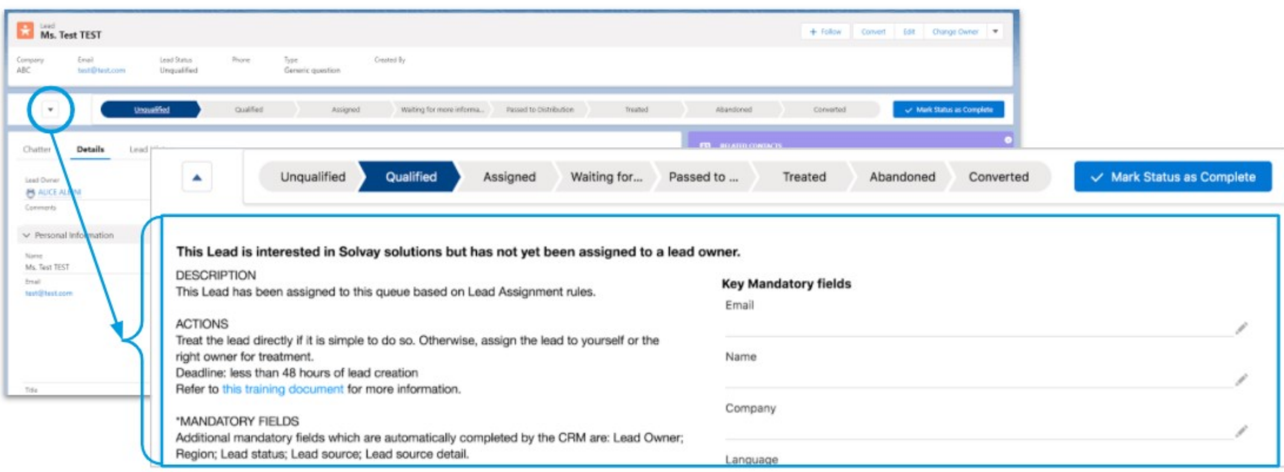
Solvay.com	Sample request	Sample request
Solvay.com	Business units	Generic question
syensqo.com	Documentation request	Request for documentation
https://www.solvairsolutions.com/en/contact-us	contact us	Generic question
https://www.solvay-proban.com/en/contact-us	contact us	Generic question
https://www.bicarz.com/en/contact-us	contact us	Generic question

Layout Overview

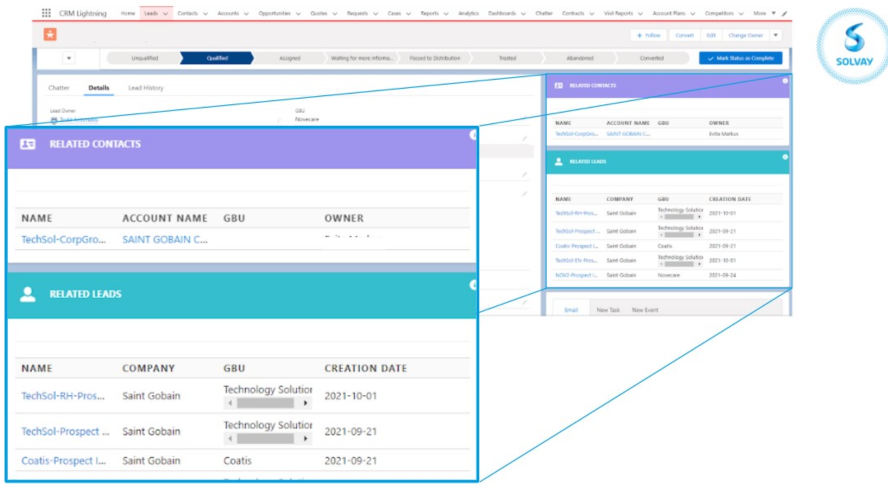
Lead layout is divided in 7 sections :

Personal Information
Lead Request
Account Information
Sample request - Quotation request
Additional Marketing Information
GDPR Consents
Qualification (UTM)

Custom Path Guidance :
The path guidance displayed is a custom component. It shows at every stage of the lead treatment a description of the stage, link to training materials and /or mandatory fields.
Mandatory fields appear at Qualified Status and Converted Status.
By default, the path guidance is ‘rolled’



Related Leads and Related Contacts Component :
Custom components have been created to show if any contact or lead is matching the email address of the lead. This helps business to see if this lead is an existing customer and/or if it has made several requests.

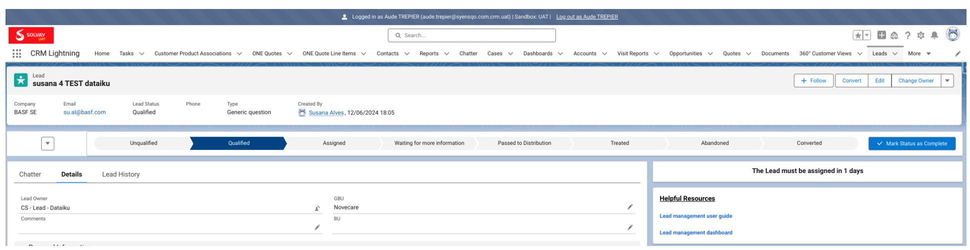
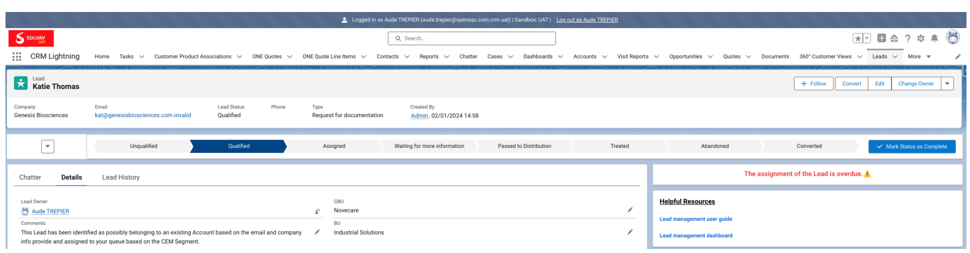
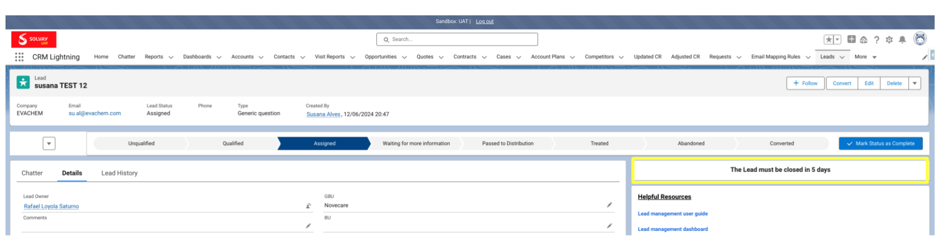


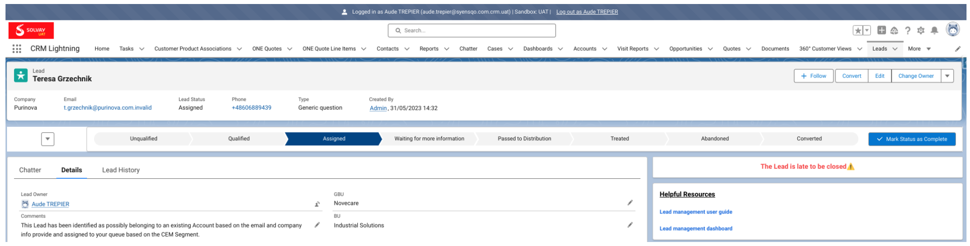
Lead KPIs for Novecare:

For each Novecare lead record, there is a message about the Lead time to Qualify and Lead time until closure, depending on the Lead Status.

When the message is written red, it means that the KPI was exceeded and the lead needs action to be taken immediately. If the message is written in black, it means that is informative and the action that should be taken is still under the expected timeline.

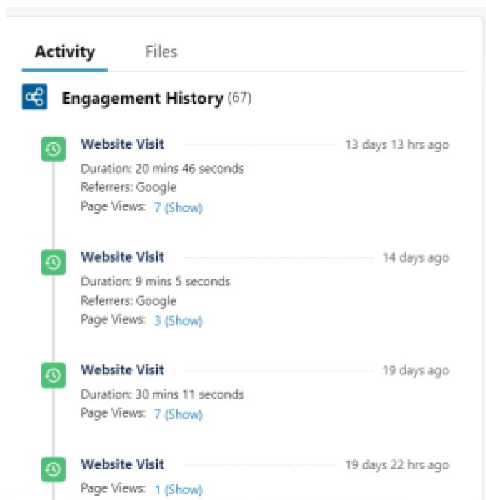
When the lead is in any other status rather than Qualified, Assigned or Waiting for more information, this information is not displayed. For any of the lead closed status, the component is hidden as well as for unqualified leads.

Lead Status	Calculation	Rule	Message
Qualified	Lead is still on track to be Assigned to an account manager (less than 4 days have passed) Calculation of the remaining days to qualify the Lead: today - Date/Time Qualified (SLV40_Date_Time_Qualified__c)	Remaining days <= 4	The lead must be assigned in X days 
Qualified	Lead is non track to be Assigned to an account manager (more than 4 days have passed) Calculation of the remaining days to qualify the Lead: today - Date/Time Qualified (SLV40_Date_Time_Qualified__c)	Remaining days > 4	The assignment of the lead is overdue 
Assigned/ Waiting for more information	Lead is on track to be closed (less than 6 days have passed) Calculation of the remaining days to close the Lead: today - Date/Time Assigned (SLV40_Date_Time_Assigned__c)	Remaining days <= 6	The lead must be closed in X days 

Assigned/ Waiting for more information	Lead is late to be closed (more than 6 days have passed) Calculation of the remaining days to close the Lead: today - Date/Time Assigned (SLV40_Date_Time_Assigned__c)	Remaining days > 6	The lead is late to be closed 

Lead Engagement History :

This component related to Pardot is displaying the customer behavior on Solvay digital products :



Lead history tracking :
History tracking has been enabled on the following fields :

BU	Source
GBU	Source Detail
Lead Owner	Company
Lead Relationship to Solvay	Email
Lead Status	End Use
Name	Job Department
Partner Type	Product
Partner Sub Type	utm source
utm campaign	utm medium

L

Fields specific automations

Product Family is mapped to **GBU**. As soon as the product family is filled (Web to lead is sending the information) it auto populates the GBU based on this Matrix :

Product Family	GBU to assigned
Amines	Novecare
Barium and Strontium derivatives	Special Chem
Calcium and Magnesium derivatives	Soda Ash & Derivatives
Composites	Composite Materials
Flavors and Fragrances	Aroma Performance
Fluorine derivatives	Special Chem
Lithium derivatives	Specialty Polymers
Mining Chemicals	Technology Solutions
Peroxygens	Peroxides
Polymers, Specialty	Specialty Polymers
Polymers, Hair Care and Personal Care	Novecare
Polymers, Nylon Fibers	Coatis
Polymers, Other	Novecare
Rare Earths and Metal compounds	Special Chem
Silicium derivatives	Silica
Sodium derivatives	Soda Ash
Specialty Chemicals	Special Chem
Specialty Polymers	Specialty Polymers
Stabilizers and Antioxidants	Technology Solutions
Surfactants	Novecare

Market Segmentation is auto-populated based on the Market Code received, using the following mapping [is the combination of Market Segmentation -> BU Mapping and Markets]:

Market Name	Market Code	GBU	BU
ADVANCED TRANSPORTATION	COMAR00031	Novecare	Industrial Solutions
AEROSPACE	COMAR00041	Novecare	Industrial Solutions
AGRO & FEED	COMAR00011	Novecare	Agro
AUTOMOTIVE	COMAR00012	Novecare	Industrial Solutions
BUILDING	COMAR00001	Novecare	Coatings
CHEMICAL INDUSTRY	COMAR00063	Novecare	Industrial Solutions
CONSUMER GOODS	COMAR00002	Novecare	Home & Personal Care
ELECTRONICS	COMAR00064	Novecare	Industrial Solutions
ENVIRONMENT & ENERGY	COMAR00007	Novecare	Industrial Solutions
FEED INDUSTRY	COMAR00021	Novecare	Agro
FOOD INDUSTRY	COMAR00008	Novecare	Industrial Solutions
HEALTHCARE	COMAR00009	Novecare	Home & Personal Care
HPC	COMAR00062	Novecare	Home & Personal Care
INDUSTRIAL APPLICATIONS	COMAR00010	Novecare	Industrial Solutions
MINING	COMAR00061	Novecare	Industrial Solutions
OIL & GAS	COMAR00006	-	-

SPP leads and Composite Materials Leads: ‘Treated’ status + closing reason = materials GBU and send to ICare CRM via Salesforce to Salesforce connector.

Lead Stages

Open statuses = unqualified, qualified, assigned, waiting for more information
Closed statuses = passed to distribution, treated, abandoned, converted

Unqualified = Only Pardot Leads are assigned to this status.

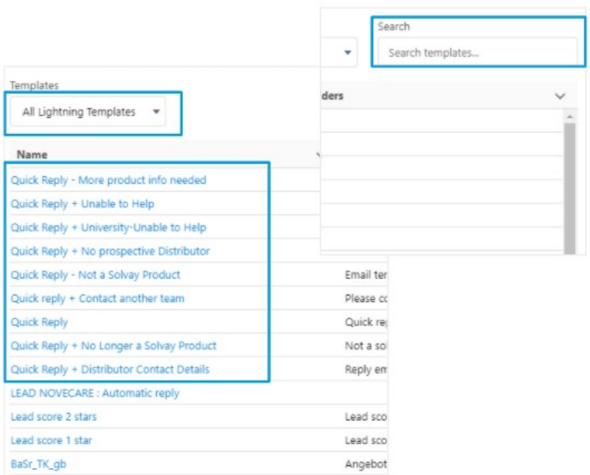
Qualified = Web leads, manual creation. Path guidance contains mandatory fields at this stage. When a lead is created, it’s assigned based on lead assignment rules or, if no match with a rule, to the creator of the lead as owner.

Assigned =
Several emails are sent automatically :

- An acknowledgement email is automatically sent by SFDC using the lead email address
- An email notification is sent to the owner of the lead at creation : a specific user, **or** the queue's generic email address and all its queue members

An email notification is sent to the MBU depending on the country

Email templates called **‘Quick Replies’** have been created to help users. They can access them from Lightning Email Templates folder :



Waiting for more information : There’s a time dependent flow at this stage. If a lead stays for 7 days at this status, an email notification is sent to the owner.
If the lead stays for 30 days at this stage, it’s automatically closed after this period with status = Abandoned + closing Reason = No Response from the customer.

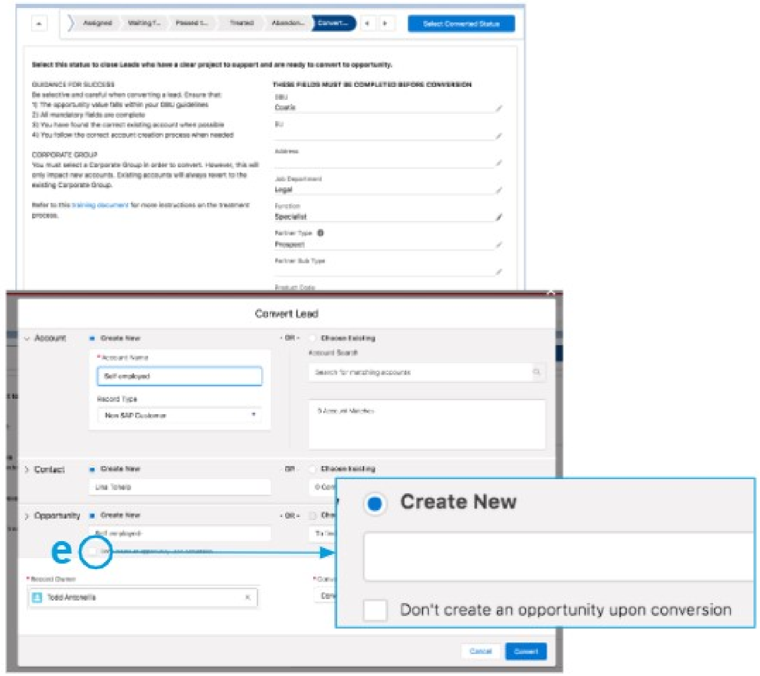
Passed to distribution : Status to direct a lead to a distributor. There are no automations associated with this status. The function is to collect more data about Leads which are passed to distributors to help inform business decisions.

Abandoned/Treated : Those closure status are working this field dependencies with closing reason based on this matrix :

Treated	**Abandoned**	**Passed to Distribution**
Answered Question	Duplicate request	Small volume
Passed on to external agent	No Response from the customer	Is a customer of a distributor
Passed on to Solvay employee outside CRM	No future business potential	Is a distributor
Sample sent	Not a Solvay product	Wants to become a distributor
SDS/Regulatory info provided	Spam	
Technical data provided	University	
	Competitor	
	Materials GBU	
	Expired	
	Generic Email	
	Non-Commercial	

Converted :
To be able to convert a lead, the user have to be the lead owner + have filled in all mandatory fields (be careful with address field which is in small parts)

The conversion process is the standard one, users can create a contact/account/opp or chose an existing one.
If they are choosing existing records, existing data will not be overwritten.



Sample or quote creation :
A sample can be opened from a contact that have been converted from a lead or an opportunity that have been created from a lead. If the lead was storing data useful (Volume, Unit of measure etc) it will be automatically filled on the sample or quote at creation.

Novecare Specific Case

As part of the lead process refactoring, a number of automations have been introduced into handling of leads assigned to the Novecare GBU.

All the Novecare automations require 2 criteria for an incoming lead to be processed by them:

- “GBU” picklist value must be “Novecare”;
- “Source” (LeadSource) picklist value must be “Web” (i.e. leads are created from a webform submission)

1. Classic Email Templates in “Novecare Templates” Folder

5 email templates in this folder are used for automated replies to auto-abandoned leads.

Templates are HTML-based but have a simplified look and layout through a custom template type.

NOVECARE AUTO ABANDON	Auto reply to inform lead request will not be answered
NOVECARE EXISTING DISTRIBUTOR GLOBAL	Existing distributor: please use MySolvayPortal
NOVECARE EXISTING DISTRIBUTOR NAM	Existing distributor: please use MySolvayPortal
NOVECARE PROSPECTIVE DISTRIBUTOR	Not looking for new distributors for the given product
NOVECARE UNIVERSITY LAB	Cannot support inquiries from Universities

Lead’s field “**Auto-Response Email Sent**” (SLV39_Novecare_Abandon_Email__c) gets set accordingly. The value of this field must be empty or set to “Standard Account” for a number of Lead Automation Rules to apply.

2. Email Address from a Free Email Provider (e.g. Gmail)

If a lead provides an email address belonging to one of the domains below and Lead’s Region field is set to NAM or EMEA, this lead’s Status will be set to “Abandoned” and the lead will receive NOVECARE AUTO ABANDON email.

These domains can be managed here:

Custom Code -> Custom Metadata Types -> "Lead Excluded Email Domains":

@126.	@gmx. gmx	@me.com	@tencent.
@163.	@hotmail.	@outlook.	@ups.
@aol.	@icloud.	@protonmail.	@yahoo.
@gmail.	@mac.com	@qq.	@yandex.
@zoho.			

3."Lead Relationship to Solvay"

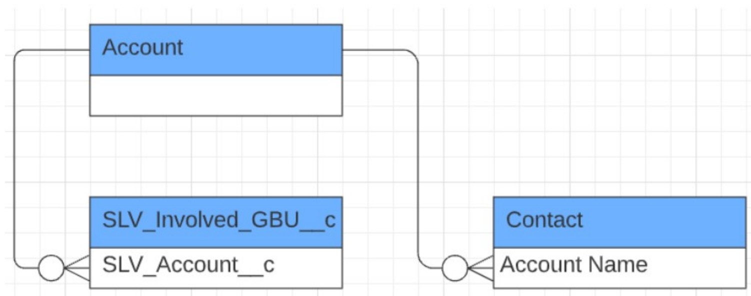
"Lead Relationship to Solvay" determines the rest of Novecare automations and therefore plays a key role in the system.

If the value of this field is one of "Works with distributor", "Existing Distributor", "Prospective Distributor" or "University Laboratory", the lead's status will be set to "Passed to distribution" (or "Auto-abandoned" in the last case) and the lead will receive one of the emails above.

4. Leads with Emails Equal to an Existing Contact's Email

Leads, whose "Lead Relationship to Solvay" is one of "Existing Customer", "Prospective Customer", "Other" or blank, get evaluated on their email address being an exact match to an already existing contact.

If a match is found and that contact's account's **GBU Customer Segmentation (SLV_Involved_GBU__c**) is one of "Strategic Key Account", "Key Account", "Critical Account" or "Standard Account", leads gets assigned to a queue using Lead Assignment Rules.



5. Lead Scoring Through Dataiku

If a lead's email is not precisely equal to an existing contact's email but "Lead Relationship to Solvay" is as above, then the following happens:

- Lead gets assigned to CS - Lead - Dataiku queue;
- Its field "**Run Daitaku**" (SLV39_Run_Daitaku__c) gets set to True;
- Dataiku (https://www.dataiku.com/), through **Daitaku Iboost Integration** user, checks leads once per hour for the True value in the field above. Matching leads' data (Email, Company name, Country) get ingested into Dataiku for analysis;
- Dataiku assigns a number of probability scores from 0 to 1 to ingested leads matching them to existing accounts (and their contacts), based on the similarity of their Company name, Email's domain and Country;
    - Note: Dataiku downloads accounts' and contacts' date once per day from Salesforce - this ensures that leads are always compared to a reasonably fresh set of data. This daily download is also done through Dataiku Iboost Integration user;
- Dataiku selects the highest probability score (or 0 if no accounts were matched) and the respective Account ID and **writes** those values to "**Match ed Account Score"** (Matched_Account_Score__c) and "**Matched Account"** (Matched_Account__c) fields on the Lead respectively. Simultaneously Dataiku changes the value of the "Run Daitaku" to False;
- Presence of Account ID and a non-empty score in the fields above triggers Salesforce to either (a) if the score is 0 (zero) or below 0.5, set the Lead Status to "Passed to Distribution" and send out NOVECARE AUTO ABANDON email to the lead, or (b) if the score is 0.5 or above, assign the lead to a queue using Lead Assignment Rules

6. Request for Documentation Leads assigned to CSR (today the system excludes Pardot leads)

User Story LSCRM-17: Assign Documentation Request Leads directly to CSR (link to US, below - please do not remove this note mention should the reference link become non-functional at some point!)

Why the new implementation: CSR users should be assigned to Documentation Request leads directly instead of going through BDM users first.

Goal: automatically assign the lead documentation requests to the appropriate CSR queue based on BU value (*Market* change) and Region value (*Country* change).

The changes aim to automate the assignment of documentation requests directly to the CSRs, bypassing the need for BDMs's intervention.

Feature Overview: feature introduces an automated process for assigning documentation request leads coming from the website directly to the relevant CSR based on predefined criteria; for any new request for documentation type of Lead open for a Novecare product, from the website forms, the CSR people (customer service representatives) will be the ones receiving the requests for documentation directly, manageable in already existing queues (see below table) to which CSR people have access as part of specific public groups (see below screenshot), instead of the BDM users.

With the new process implemented, when a new request for documentation type of Lead is being created in the system, the lead will be assigned to one of the newly created queues below based on **region** and **market** change in value. Once submitted, the lead request for documentation will be created in the system, and the Lead owner will automatically become a CSR queue to which certain users in different public groups will have access.

Addresses to: Implementation only applies to Novecare GBU when a new documentation request gets created

Queue	Public Group
CS-CSR-Agro-EMEA	QUE-CS-CSR-Agro-EMEA
CS-CSR-Agro-NAM	QUE-CS-CSR-Agro-NAM
CS-CSR-HPC-EMEA	QUE-CS-CSR-HPC-EMEA
CS-CSR-HPC-NAM	QUE-CS-CSR-HPC-NAM
CS-CSR-IPS-EMEA	QUE-CS-CSR-IPS-EMEA
CS-CSR-IPS-NAM	QUE-CS-CSR-IPS-NAM
CS-CSR-Coatings-EMEA	QUE-CS-CSR-Coatings-EMEA
CS-CSR-Coatings-NAM	QUE-CS-CSR-Coatings-NAM
CS-Sample-APAC Support Office	QUE-CS-Sample-APAC Support Office

The CS-CSR-IPS-EMEA is the default queue for all “Request for documentation” leads without a BU assigned.

Queue	Conditions to enter the queue
CS-CSR-Agro-EMEA	Region = EMEA BU = Agro
CS-CSR-Agro-NAM	Region = NAM BU = Agro
CS-CSR-HPC-EMEA	Region = EMEA BU = Home & Personal Care, Amines, Easy Soft
CS-CSR-HPC-NAM	Region = NAM BU = Home & Personal Care, Amines, Easy Soft
CS-CSR-IPS-EMEA	Region = EMEA BU = Industrial Solutions, NA/Tooling
CS-CSR-IPS-NAM	Region = NAM BU = Industrial Solutions, NA/Tooling
CS-CSR-Coatings-EMEA	Region = EMEA BU = Coatings
CS-CSR-Coatings-NAM	Region = NAM BU = Coatings

Prerequisites so that Request for Documentation Leads created from Website forms get assigned to the appropriate queues above:

1. When going to the website and to *Documentation Request* for a Novecare product: example: http://sco.np2-solvaysf2.acsitefactory.com/en/form/documentation?product_code=90071212&product_label=Mirapol®, to create a new documentation request, *the **Product** one chooses from the website for the new request for documentation has to be a Novecare Product from the list view "All Products Novecare" on the Product object.*

Products
All products Novecare

New | Printable View

50+ items • Sorted by Product Name • Filtered by All products - Level, GBU • Updated a few seconds ago

Search this list...

	Product Name ↑	Produ...	Level	Level 1	Level 2	Level 3	Level 4	Act...
1	ABEX 18 S 460LB CHP	108544	Level 5	SULFATES & SULFONATES	SULFATES & SULFONATES	LINEAR ALKYL ETHER SULFATE	ABEX 18 S	✓
2	ABEX 2115 A 2200 TOTE	41272	Level 5	SULFATES & SULFONATES	SULFATES & SULFONATES	OTHER SULFATE	ABEX 2115 A	✓
3	ABEX 23 S 460LB CHP	108498	Level 5	SULFATES & SULFONATES	SULFATES & SULFONATES	LINEAR ALKYL ETHER SULFATE	ABEX® 23 S	✓
4	ABEX 2515 460LB CHP	108499	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2515	✓
5	ABEX 2515 200KG PLASTIC DRUM	124606	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2515	✓
6	ABEX 2525/40 460LB CHP	72091	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2525 40	✓
7	ABEX 2525/40 BULK	75833	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2525 40	✓
8	ABEX 2535 209KG PLASTIC DRUM	146841	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2535	✓
9	ABEX 2535 460LB CHP	108535	Level 5	ALKOXYLATES	ALKOXYLATES	ALKOXYLATE BLEND	ABEX 2535	✓
10	ABEX EP 100 2200LB TOTE	105177	Level 5	SULFATES & SULFONATES	SULFATES & SULFONATES	ALKYLPHENOL ETHER SULFATE	ABEX EP 100	✓
11	ABEX EP 110 470LB CHP	74454	Level 5	SULFATES & SULFONATES	SULFATES & SULFONATES	ALKYLPHENOL ETHER SULFATE	ABEX EP 110	✓

2. Company and **Email** address (on the website form) need to match those of clients which exist in the system; if the system can't find the matching contact and account, a new lead will be created in the system but it will not be assigned to any of the queues related to this functionality.

So that a matching Contact can be found the email needs to match the email domain of an already existing Contact in the system (otherwise the lead will be assigned to the "CS - Lead - Dataiku" queue) and that contact's account's **GBU Customer Segmentation (SLV_Involved_GBU__c)** be one of "Strategic Key Account", "Key Account", "Critical Account" or "Standard Account".

*NOTE: *The system is looking for a Contact in SF with the same email address as our Lead (to relate/connect our new Lead to) + the Contact once found needs to be related (through direct relation, directly on the lookup field) to an Account with the same name as the one of the "Company" value/name on the Lead. Lead record related Contacts Account*

3. Relationship to Syensqo (on the website form), which maps against **"Lead Relationship to the Company"** (SLV10_LEA_Customer_Type__c) needs to be "Existing Customer", "Prospective Customer" or "Other" to get evaluated as being an exact match to an already existing customer, otherwise the lead will be assigned to "CS - Lead - Auto Abandon" queue instead.

4. Select a Market (on the website form) value determines the value the **"BU"** field on the Lead in the system populates to whereas the **Country & Region** (on the website form) value determines the "Country" and **"Region"** value, both of which will determine the queue.

Market needs to be either one of the following values, in the Utilities "Market Segmentation -> BU Mapping" matrix for the BU to be filled in with the appropriate value for the Lead to be assigned to one of the queues:

Utilities
Market Segmentation -> BU Mapping

New | Change Owner | Printable View | Assign Label

16 items • Sorted by BU • Filtered by Record Type • Updated a few seconds ago

Search this list...

	GBU	Market Segmentation	BU ↑	Name
1	Novecare	FEED INDUSTRY	Agro	01208000000FZpWAAW_Novecare_Agro_a0x240000015YfkAAE
2	Novecare	AGRO & FEED	Agro	01208000000FZpWAAW_Novecare_Agro_a0x24000000VyqUAAS
3	Novecare	BUILDING	Coatings	01208000000FZpWAAW_Novecare_Coatings_a0x24000000VyqMAAS
4	Novecare	HPC	Home & Personal Ca...	01208000000FZpWAAW_Novecare_Home & Personal Care_a0x0800000thzi5AAA
5	Novecare	HEALTHCARE	Home & Personal Ca...	01208000000FZpWAAW_Novecare_Home & Personal Care_a0x24000000VyqSAAS
6	Novecare	CONSUMER GOODS	Home & Personal Ca...	01208000000FZpWAAW_Novecare_Home & Personal Care_a0x24000000VyqNAAS
7	Novecare	MINING	Industrial Solutions	01208000000FZpWAAW_Novecare_Industrial Solutions_a0x24000004tVVVAA2
8	Novecare	INDUSTRIAL APPLICATIONS	Industrial Solutions	01208000000FZpWAAW_Novecare_Industrial Solutions_a0x24000000VyqTAAS
9	Novecare	FOOD INDUSTRY	Industrial Solutions	01208000000FZpWAAW_Novecare_Industrial Solutions_a0x24000000VyqRAAS
10	Novecare	ENVIRONMENT & ENERGY	Industrial Solutions	01208000000FZpWAAW_Novecare_Industrial Solutions_a0x24000000VyqQAAS
11	Novecare	OBS *** ENERGY SOLUTIONS	Industrial Solutions	01208000000FZpWAAW_Novecare_Industrial Solutions_a0x24000004sCV4AAM

Reference link to implementation requirement:

⚠ **Unable to locate Jira server for this macro. It may be due to Application Link configuration.**

7. Leads assigned directly to the Account Managers

Rules for TS & Aroma

For Technology Solutions and Aroma, all the web-to-lead leads created (excluding Pardot leads), for any lead type, will become assigned to the corresponding account manager based on two matrices created in Utility:

- TS - Lead Domain Matrix
- Aroma - Lead Domain Matrix

These matrices shared with the public group PA-SHR-Utility Edit, to be maintained by the GBU Data Steward and they keep the information about the account managers and the domains they manage the leads. They are created in Utility using a new record type named "Lead Customer Domain Matrix" with the following fields:

Field Name	Used for	Mandatory?
Name	Account/Company Name	Yes
GBU	identify and match the lead GBU	Yes
Email	email domain	Yes
Region SLV9_Region__c	None means valid for all Regions	No
First Approver	Account Manager	Yes
is Active	if active means that can be used for the matching if is not active, is not used for the lead assignment	Yes

The logic (Lead - After Save Actions flow) to assign Leads to the lead owners in the matrices is:

- when there is a contact in CORE CRM with the lead email that matches the email domain in the matrix OR the lead email matches the email domain in the matrix
- the Lead Region matches the region in the matrix, otherwise region equals to None can be used for all regions
- the GBU Lead matches the GBU matrix record and the record in the matrix is flagged as Active

The system picks the First Approver which is the Account Manager and assigns him as the Lead owner. Additionally, the Lead Status is updated by the system to Assigned and the SLV40_Existing_customer__c should become true.

- if the email domain does not exist in the matrix, then the system applies the existing lead assignment rules

Rules for Novecare

For Novecare, when the lead type is request for sample, request for quotation, generic question or product inquiry (except for documentation request) and after the lead being processed by the Dataiku, which means that Dataiku will try to find the Matched Account and will also run the lead assignment rules and assign a lead owner. After this, there is additional logic to check:

- if the Matched Account exists the system will (Lead - After Save Actions flow):
  - search in the account team, for the account team member (AccountTeamMember standard object) that is active and the Role is equals to Account Manager (SAP)
  - the account manager (user) Multi_GBU_Access__c should contain Novecare
  - if one account manager found, assign him as the lead owner
  - if more than one account manager in the account
    - select the one that matches the lead region (NAM, LAM, EMEA, APAC)
    - if no account manager matches the lead region, select one account manager randomly and assign him as the lead owner
  - update the lead status to Assigned
- if the Matched Account is empty, the lead owner (a queue) assigned by the assignment rules triggered by the Dataiku will not change and the lead status remain Qualified

For Novecare, when the lead type documentation request, the lead is assigned directly to the CSR (not yet in production)

8. Novecare Pardot Leads for Home and Personal Care without Pardot Questions automatically set to the Abandoned Status

When a lead is created with the Lead Source Pardot, the Lead Status Qualified, the Lead Owner CS-Lead-Campaign-HPC, Lead BU as Home & Personal Care and Pardot Question Asked is empty, then the system

The system will automatically update the following fields in the lead (Lead - Novecare Auto Abandon flow):

- Lead Status to 'Abandoned'
- Closing_Reason__c to Non-Commercial
- Lead Owner to “CS - Lead - Auto Abandon”

9. Novecare Leads re-assigned when the Account Manager is Out Of Office

The out of office process is running once per day around 00:30 AM (GMT+2) (Out of Office - Reassign Records flow) and is checking all for the out of office entries with the start date starting on that day.

For all the out of offices starting on that day, the system will check if there is a Back Up defined:

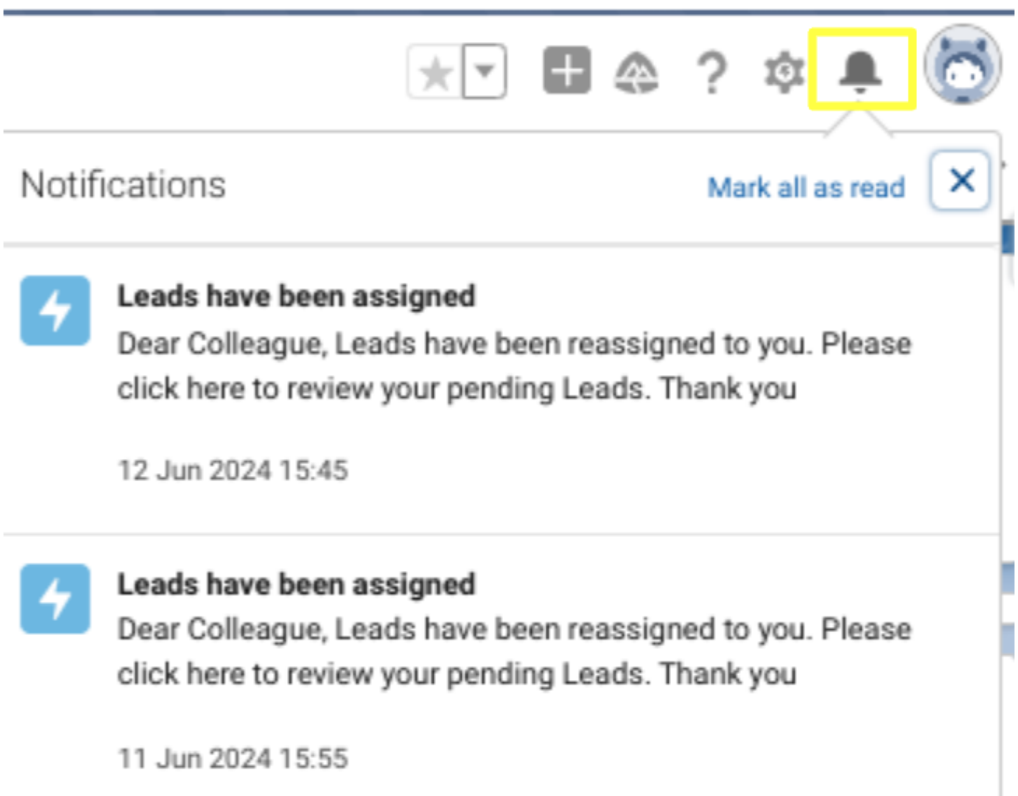
- when there is a backup, the system will transfer all the leads to the user defined as the backup.
- when there is no backup, the system will run the assignment rules that will re-assign the lead to the BDM's queues

The system will transfer the leads that met the following criteria:

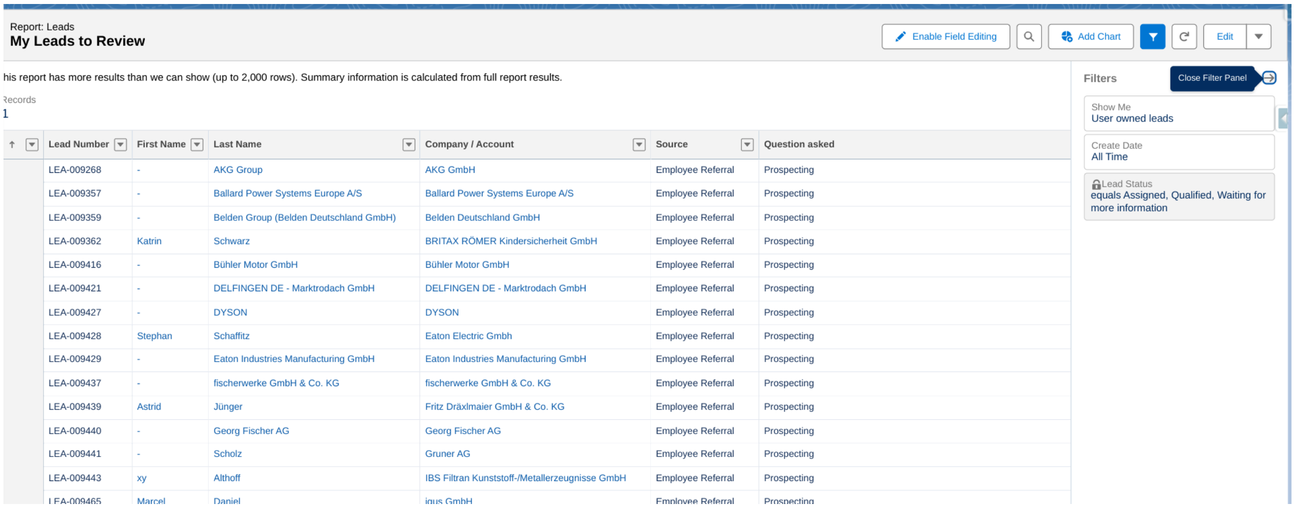
- the Lead status is assigned or qualified
- the lead owner is a person (not a queue) with the profiles `End Users Lightning` or `Corporate Sales & Marketing Lightning`
- the lead owner is still the account manager with the Out Of Office active (has started)
- lead owner is from Novecare (**Multi-GBU Access** contains Novecare)

For the new account managers that received new leads assigned to them, the system created a bell notification advising that there are pending leads assigned to him.

Click on the bell and see the following message:



Click on the message and get redirected to the report "My Leads to Review" saved on Novecare folder "Novecare reports for SFDC users > Novecare Leads".



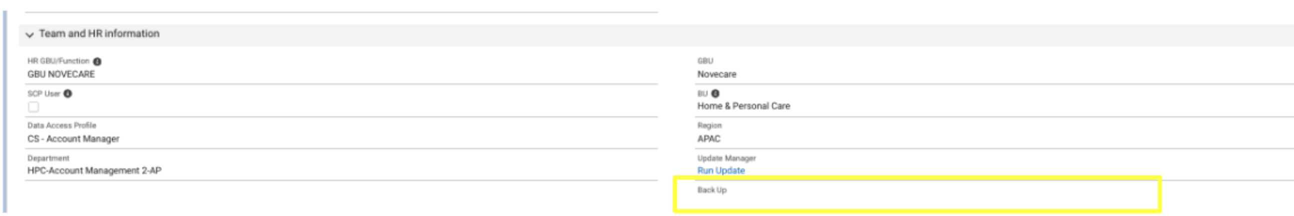
Lead Number	First Name	Last Name	Company / Account	Source	Question asked
LEA-009268	-	AKG Group	AKG GmbH	Employee Referral	Prospecting
LEA-009357	-	Ballard Power Systems Europe A/S	Ballard Power Systems Europe A/S	Employee Referral	Prospecting
LEA-009359	-	Belden Group (Belden Deutschland GmbH)	Belden Deutschland GmbH	Employee Referral	Prospecting
LEA-009362	Katrin	Schwarz	BRITAX RÖMER Kindersicherheit GmbH	Employee Referral	Prospecting
LEA-009416	-	Bühler Motor GmbH	Bühler Motor GmbH	Employee Referral	Prospecting
LEA-009421	-	DELFINGEN DE - Marktrodach GmbH	DELFINGEN DE - Marktrodach GmbH	Employee Referral	Prospecting
LEA-009427	-	DYSON	DYSON	Employee Referral	Prospecting
LEA-009428	Stephan	Schaffitz	Eaton Electric Gmbh	Employee Referral	Prospecting
LEA-009429	-	Eaton Industries Manufacturing GmbH	Eaton Industries Manufacturing GmbH	Employee Referral	Prospecting
LEA-009437	-	fischerwerke GmbH & Co. KG	fischerwerke GmbH & Co. KG	Employee Referral	Prospecting
LEA-009439	Astrid	Jünger	Fritz Dräxlmaier GmbH & Co. KG	Employee Referral	Prospecting
LEA-009440	-	Georg Fischer AG	Georg Fischer AG	Employee Referral	Prospecting
LEA-009441	-	Scholz	Gruner AG	Employee Referral	Prospecting
LEA-009443	xy	Althoff	IBS Filtran Kunststoff-/Metallerzeugnisse GmbH	Employee Referral	Prospecting
LEA-009465	Marcel	Daniel	igus GmbH	Employee Referral	Prospecting

Important to know

- The account manager is the one responsible to create his out of office in CORE (the one in Gmail/Outlook will not work).
- For a short period of time (short out of office period), the account manager will not create the Out Of Office and the lead will remain assigned to him or he can assign it manually to a colleague if needed.
- The backup will never be added or removed automatically by the system. The backup should be managed by the account manager.
- The assignment rules are not running when the lead is re-assigned to the backup person or back to the original account manager
- The system is not able to recognize if the backup of the account manager has an active out of office or will be out of office in the future. The account manager must select someone as a backup that will not be out of office at the same time as himself.

Actions to be performed by the account manager:

1 - the account manager defines his Back Up on the User page, in the Team and HR information section



2 - the account manager defines his Out Of Office time in CRM (How to setup Out of Office in CRM) before getting out of the office

The out of office process will run every day to assign the leads to the corresponding backups or queues.

10. Novecare leads acknowledge the customer when the lead is assigned to the account manager for analysis

When the lead is created for Novecare, the customer is receiving an email notification informing that the Lead was created and was assigned to our internal teams.

(Email Template: Email to Cust Acknowledg Templ)

Sandbox: (No Reply) Your Syensqo Inquiry : LEA-197967 Inbox ×

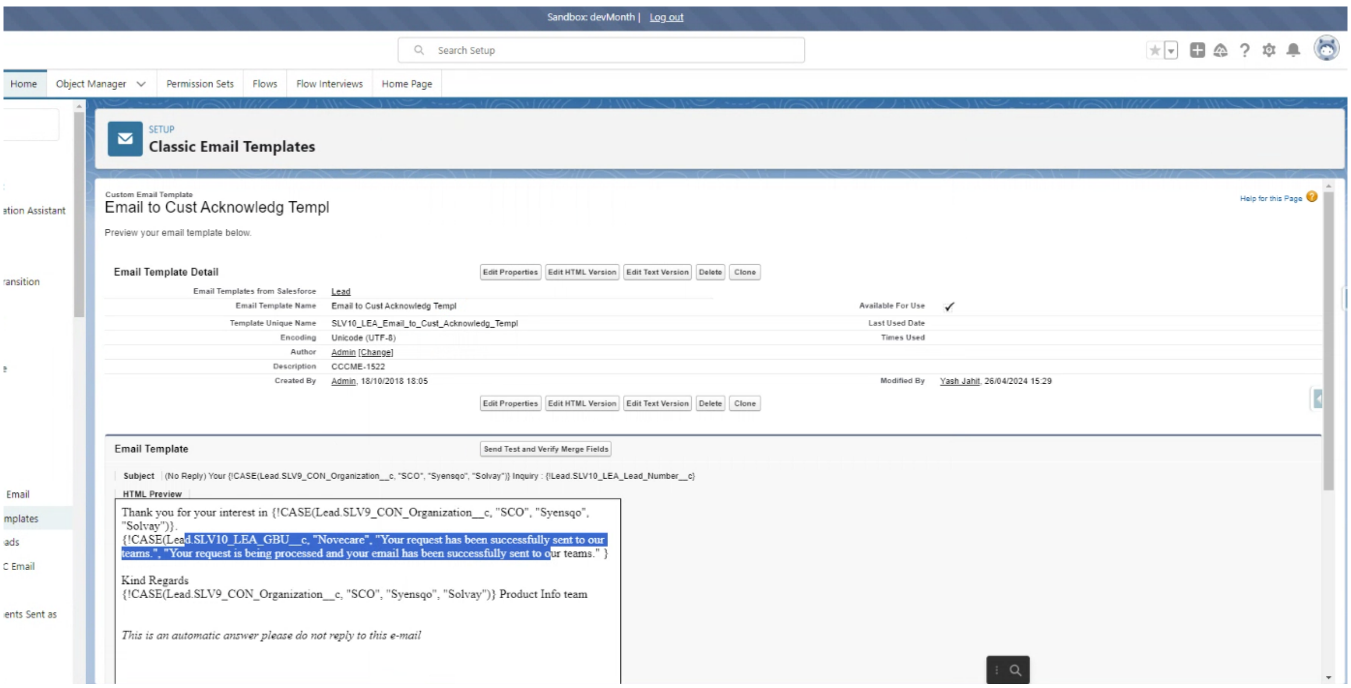
Admin <crm.support@syensqo.com>
to me

Thank you for your interest in Syensqo.
Your request is being processed and your email has been successfully sent to our teams.

Kind Regards
Syensqo Product Info team

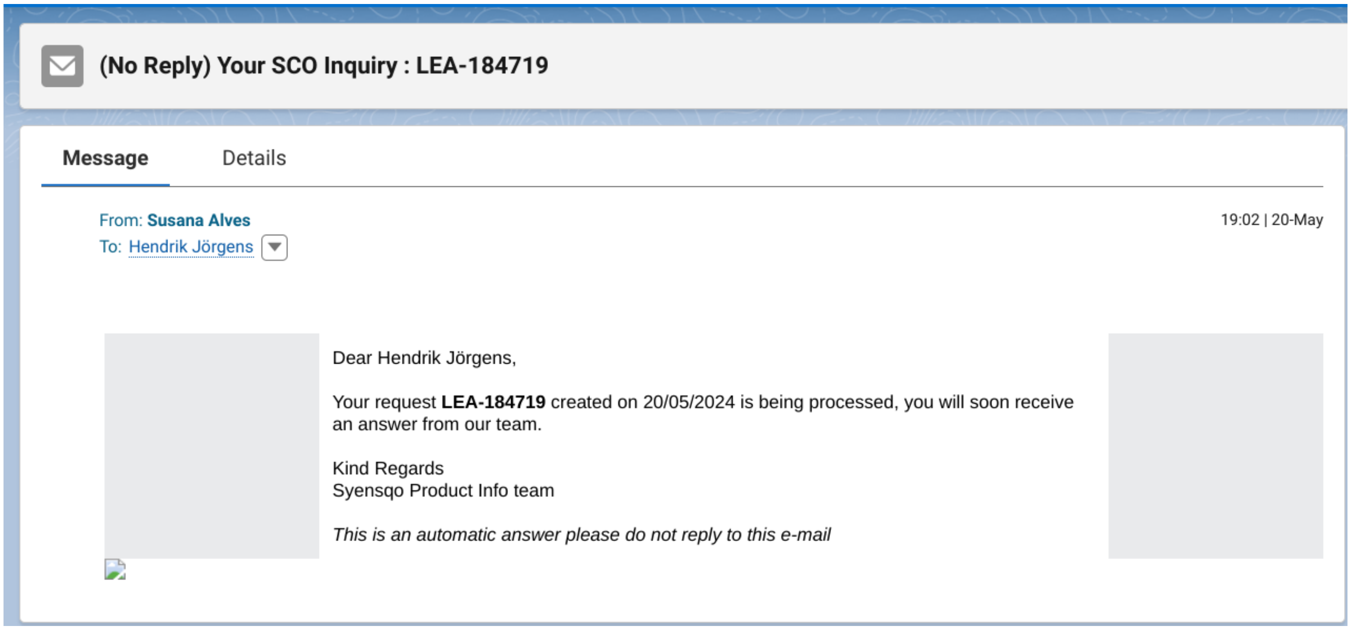
This is an automatic answer please do not reply to this e-mail

The text in blue is the one that will be sent when GBU is Novecare



When the Novecare lead is assigned to an account manager, the customer is receiving an email informing him that we are processing his lead

(Email Template: Email to Customer Lead under Treatment)



Important to know

The lead could be re-assigned to another account manager several times, however the customer will not receive the email notification again (only on the first time when is re-assigned to the first account manager)

11. Novecare Lead Queues

20 queues have been created for business users based on their BU and geographic location:

CS - Lead - APAC KA + critical - Agro	For Leads matched to higher than Standard Accounts
CS - Lead - APAC KA + critical - HPC	As above
CS - Lead - APAC KA + critical - Indus	As above
CS - Lead - APAC KA + critical -Coatings	As above
CS - Lead - APAC Transactional	For Leads matched to Standard Accounts
CS - Lead - EMEA KA + critical - Agro	For Leads matched to higher than Standard Accounts
CS - Lead - EMEA KA + critical - HPC	As above
CS - Lead - EMEA KA + critical - Indus	As above
CS - Lead -EMEA KA + critical - Coatings	As above
CS - Lead - EMEA Transactional	For Leads matched to Standard Accounts
CS - Lead - LAM KA + critical - Agro	For Leads matched to higher than Standard Accounts
CS - Lead - LAM KA + critical - Coatings	As above
CS - Lead - LAM KA + critical - HPC	As above
CS - Lead - LAM KA + critical - Indus	As above
CS - Lead - LAM Transactional	For Leads matched to Standard Accounts
CS - Lead - NAM KA + critical - Indus	For Leads matched to higher than Standard Accounts
CS - Lead - NAM KA + critical - Agro	As above
CS - Lead - NAM KA + critical - Coatings	As above
CS - Lead - NAM KA + critical - HPC	As above
CS - Lead - NAM Transactional	For Leads matched to Standard Accounts
CS-CSR-Agro-NAM	For Lead from Request for Documentation that match lead Market Segmentation and lead region
CS-CSR-HPC-EMEA	As above

CS-CSR-HPC-NAM	As above
CS-CSR-IPS-EMEA	As above
CS-CSR-IPS-NAM	As above
CS-CSR-Coatings-EMEA	As above
CS-CSR-Coatings-NAM	As above
CS-Sample-APAC Support Office	For Lead from Request for Documentation when lead region is APAC

Queues have respective groups as their members and all are set to send emails to individual members.

1. Additionally, 2 technical queues have been created for the purposes of holding auto-abandoned and Dataiku-assigned leads:

CS - Lead - Auto Abandon	This queue holds all leads, whose Status has been set to “**Passed to distribution**” or “**Abandoned**”
CS - Lead - Dataiku	This queue holds leads temporarily (for around an hour) while the system awaits Dataiku scoring hourly run

12. Lead Assignment Rules for Novecare

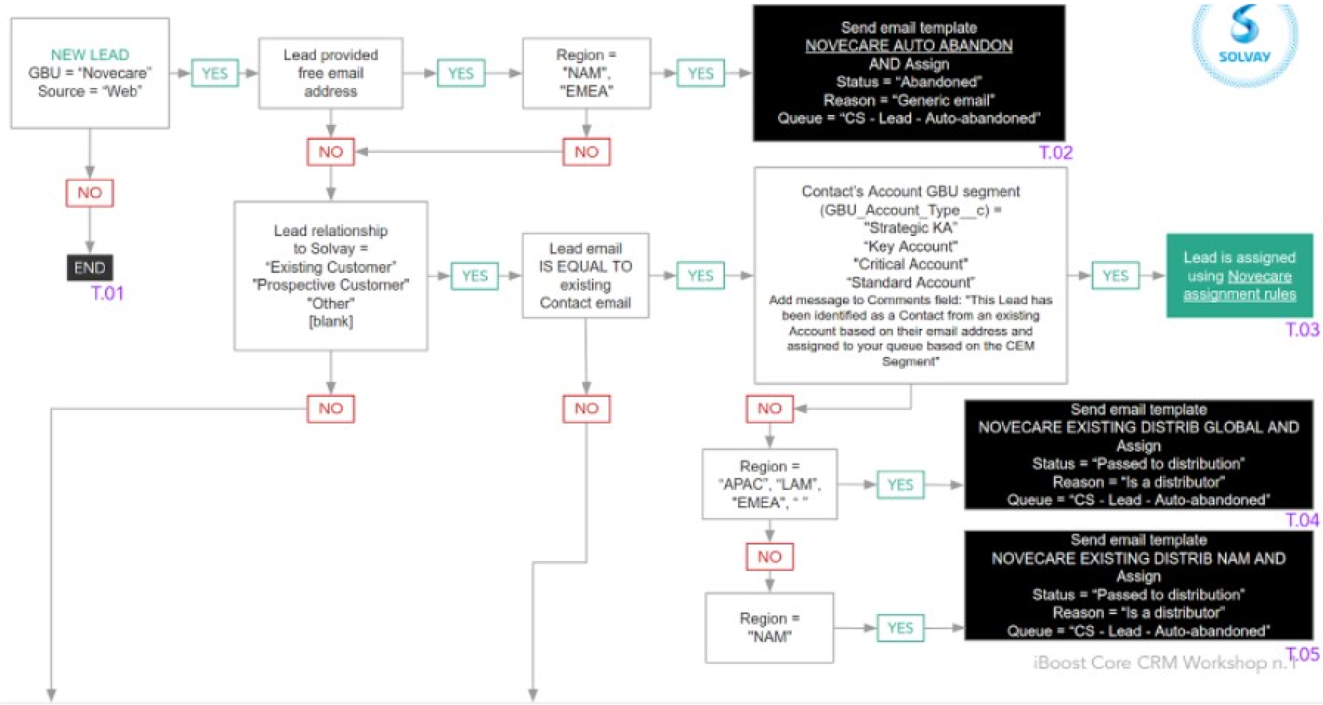
A number of new Lead Assignment Rules have been created to accommodate lead assignment based on GBU Segmentation, region and BU.

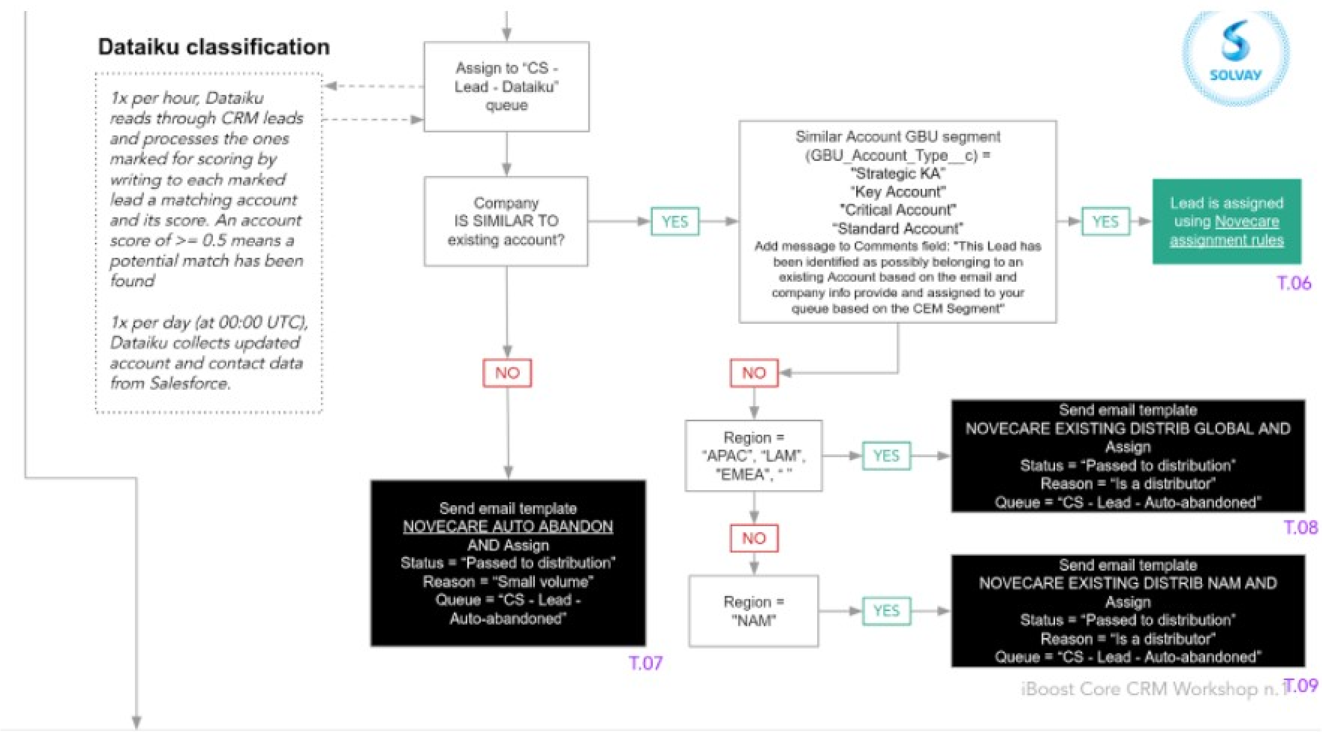
Lead fields used in Novecare Lead Assignment Rules:

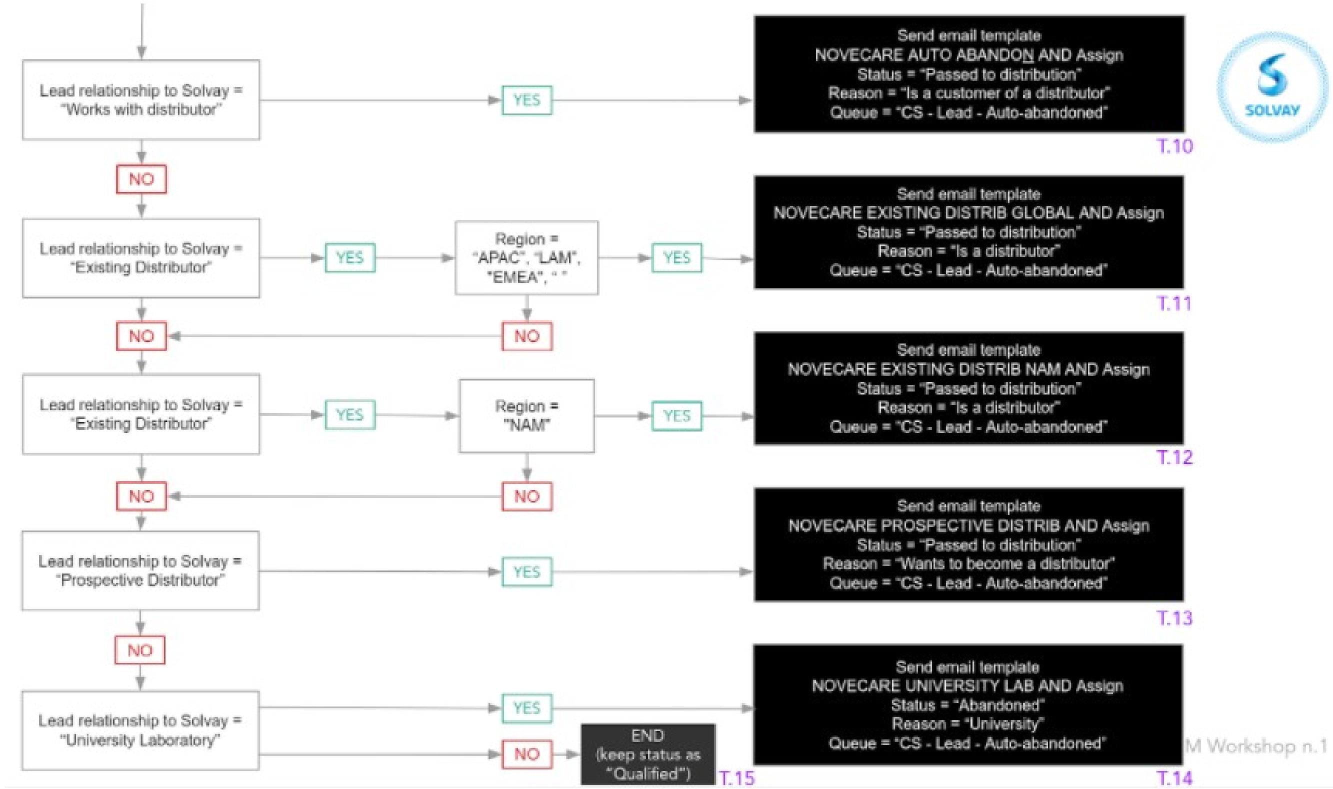
LeadSource	In this context, must always be “Web”
SLV10_LEA_GBU__c	In this context, must always be “Novecare”
SLV39_Novecare_Abandon_Email__c	Must be empty or “Standard Account”
SLV10_LEA_Region__c	Must be “EMEA”, “NAM”, “APAC” or “LAM
SLV40_Run_Assignment_Rules__c	Checked for ISCHANGED()
$User.LastName	Checked for "Iboost Integration"

The latter 2 are a special case and are used to enable Lead Assignment Rules to run again, after the Dataiku score has been set, while preventing infinite loops in lead assignment.

NOVECARE AUTOMATIONS FLOWCHART


NEW LEAD
GBU = "Novecare"
Source = "Web"
YES
Lead provided free email address
YES
Region = "NAM", "EMEA"
YES
Send email template
NOVECARE AUTO ABANDON
AND Assign
Status = "Abandoned"
Reason = "Generic email"
Queue = "CS - Lead - Auto-abandoned"
T.02
SOLVAY
NO
NO
NO
END
T.01
Lead relationship to Solvay =
"Existing Customer"
"Prospective Customer"
"Other"
[blank]
YES
Lead email IS EQUAL TO existing Contact email
YES
Contact's Account GBU segment
(GBU_Account_Type__c) =
"Strategic KA"
"Key Account"
"Critical Account"
"Standard Account"
Add message to Comments field: "This Lead has been identified as a Contact from an existing Account based on their email address and assigned to your queue based on the CEM Segment"
YES
Lead is assigned using Novecare assignment rules
T.03
NO
NO
NO
Region = "APAC", "LAM", "EMEA", " "
YES
Send email template
NOVECARE EXISTING DISTRIB GLOBAL AND Assign
Status = "Passed to distribution"
Reason = "Is a distributor"
Queue = "CS - Lead - Auto-abandoned"
T.04
NO
Region = "NAM"
YES
Send email template
NOVECARE EXISTING DISTRIB NAM AND Assign
Status = "Passed to distribution"
Reason = "Is a distributor"
Queue = "CS - Lead - Auto-abandoned"
T.05
iBoost Core CRM Workshop n.1


Dataiku classification
1x per hour, Dataiku reads through CRM leads and processes the ones marked for scoring by writing to each marked lead a matching account and its score. An account score of >= 0.5 means a potential match has been found
1x per day (at 00:00 UTC), Dataiku collects updated account and contact data from Salesforce.
Assign to "CS - Lead - Dataiku" queue
SOLVAY
Company IS SIMILAR TO existing account?
YES
Similar Account GBU segment
(GBU_Account_Type__c) =
"Strategic KA"
"Key Account"
"Critical Account"
"Standard Account"
Add message to Comments field: "This Lead has been identified as possibly belonging to an existing Account based on the email and company info provide and assigned to your queue based on the CEM Segment"
YES
Lead is assigned using Novecare assignment rules
T.06
NO
NO
Region = "APAC", "LAM", "EMEA", " "
YES
Send email template
NOVECARE EXISTING DISTRIB GLOBAL AND Assign
Status = "Passed to distribution"
Reason = "Is a distributor"
Queue = "CS - Lead - Auto-abandoned"
T.08
Send email template
NOVECARE AUTO ABANDON
AND Assign
Status = "Passed to distribution"
Reason = "Small volume"
Queue = "CS - Lead - Auto-abandoned"
T.07
NO
Region = "NAM"
YES
Send email template
NOVECARE EXISTING DISTRIB NAM AND Assign
Status = "Passed to distribution"
Reason = "Is a distributor"
Queue = "CS - Lead - Auto-abandoned"
T.09
iBoost Core CRM Workshop n.1



Reporting :

SFDC Iboost Dashboard : https://solvay-crm.lightning.force.com/lightning/r/Dashboard/01Z08000000ktVOEAY/view?queryScope=userFolders
Qlik Dashboard : soon to be live

Novecare Reports on Leads KPIs

Novecare lead time Calculation for leads

Novecare leads L1 LT

Novecare leads L2 LT

Novecare leads L3 per lead owner

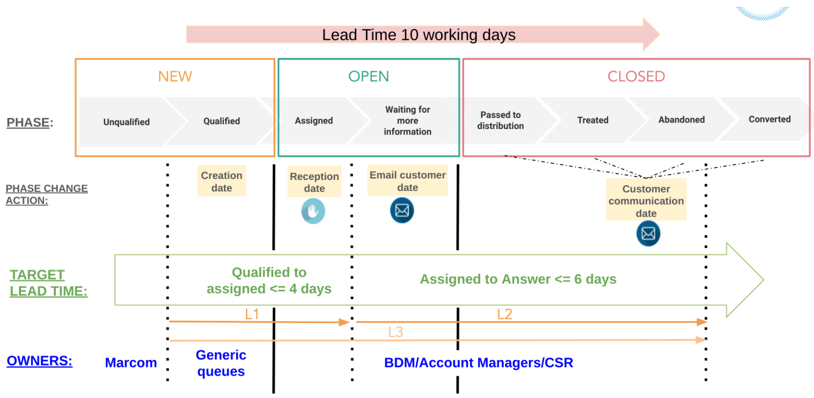
Novecare leads Lead time for treatment

Dashboard Novecare leads Lead time for treatment

Novecare Lead KPIs

Novecare has the goal to close a lead in 10 days, 4 days from created to assigned and 6 days from assigned to closed.

Business is using naming L1 to represent the time in days the lead remains between Qualified and Assigned status, L2 to represent the time in days the lead remains between Assigned and one of the Closed status and L3, the sum up of L1 and L2.



Overall TARGET Lead times is max. 10 days for all leads from Assign to Complete (pass to distribution / Treated / Abandoned / Converted).
Objective : 80 % of the leads treated within 10 working days

For reporting purposes there were created 3 new formula fields on Leads to save the KPIs explained above:

1) L1 - Time Creation to Treatment w/o Waiting - is the time the lead stays between Qualified and Assigned status excluding the time in Waiting for more Information from the customer

2) L2 - Time Assignment to Treatment w/o Waiting - is the time the lead stays between Assigned and one of the Closed status excluding the time in Waiting for more Information from the customer

3) L3 - Lead Time Open w/o Waiting - is the time the lead is open in Qualified until it gets closed in one of the closed status (Passed to Distribution, Treated, Abandoned, Converted) excluding the time in Waiting for more Information from the customer

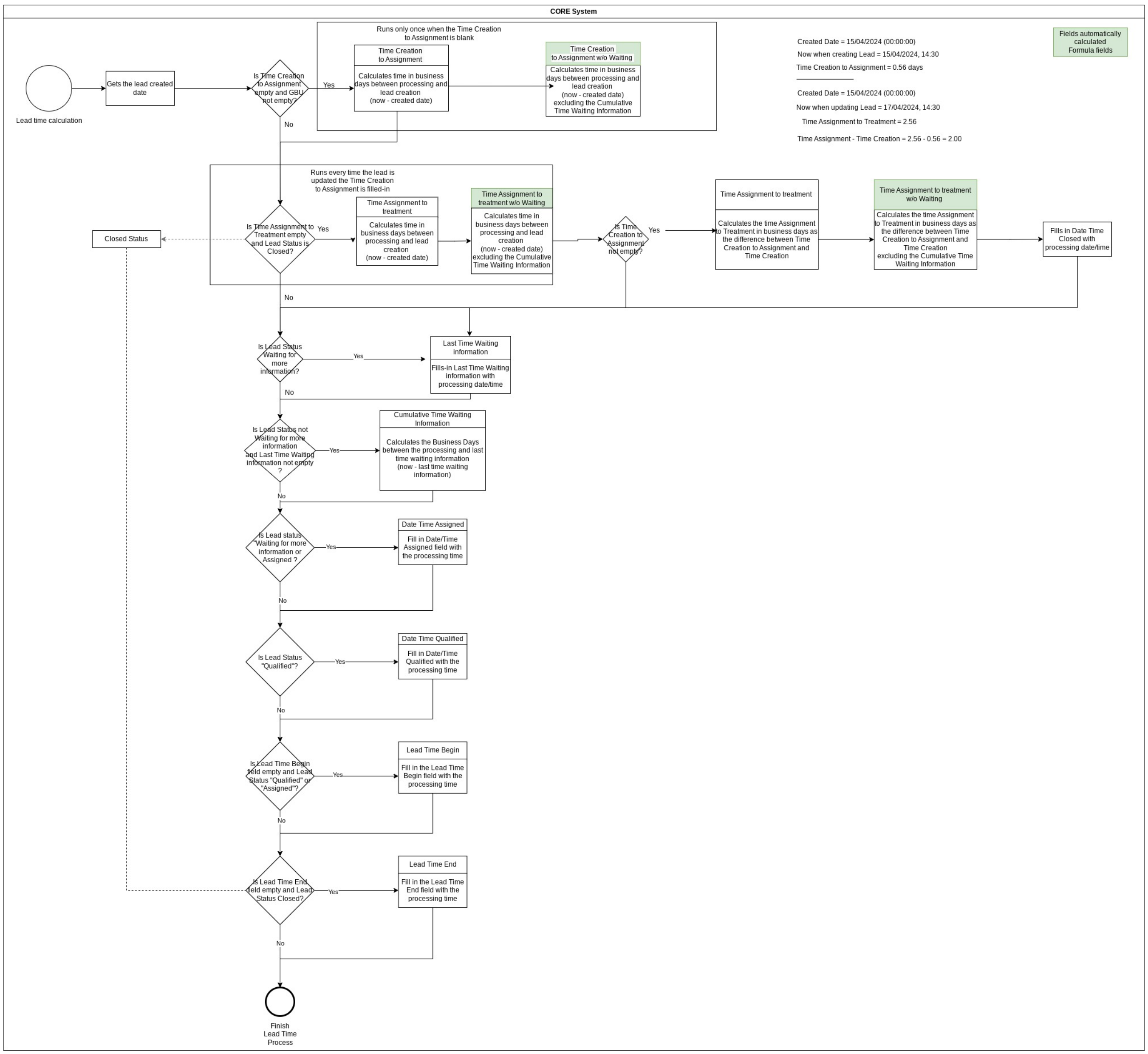
There are several fields on Leads to save and control the KPIs

Field Name	How it is calculated (time in business days, from Monday to Friday)	When is calculated	Lead Status	
Date Time Closed	the date now	if Time Creation to Assignment is populated GBU is populated Lead Status is one of Passed to Distribution, Treated, Converted, Abandoned	Lead Status is one of Passed to Distribution, Treated, Converted, Abandoned	
Date/Time Assigned	the date now	Lead status is Waiting for more information or Assigned	Waiting for more information, Assigned	
Date/Time Qualified	the date now	Lead status is Qualified	Qualified	
Lead Time Open	the date now - Lead Time Begin or Lead Time End - Lead Time Begin	every time we look into the field (formula)		
Lead Time Begin	the date now	Lead status is Qualified or ~~Assigned~~ Lead Time Begin is blank	Qualified ~~or Assigned~~	
Lead Time End	the date now	Lead Time End is blank Lead status is Closed	Lead Status is one of Passed to Distribution, Treated, Converted, Abandoned	
Last Time Waiting Information	the date now	Time Assignment to Treatment is blank Lead status not closed	Waiting for more information	
Cumulative Time Waiting Information	difference between the date now and Last Time Waiting Information	Last Time Waiting Information is populated Lead status is not closed GBU is blank or not	Assigned, Qualified, Passed to Distribution, Treated, Converted, Abandoned these days do not count for the lead time calculation L2 and L3	
Time ~~Creation~~ Qualified to Assignment	difference between the date now and lead created date	Time Creation to Assignment is blank GBU is populated	does not check the lead status corresponds to L1	

Time Assignment to Treatment	(1) difference between the date now and Lead Created Date (2) difference between the Time Creation to Assignment and lead created date	if Time Assignment to Treatment is blank, the calculation is (1) if Time Creation to Assignment is populated, the calculation is (2) GBU is populated Lead Status is one of Passed to Distribution, Treated, Converted, Abandoned	Lead Status is one of Passed to Distribution, Treated, Converted, Abandoned corresponds to L2	
Time ~~Creation~~ Qualified to Treatment	if Time Creation to Assignment is blank, then zero Time ~~Creation~~ Qualified to Assignment + Time Assignment to Treatment	every time we look into the field (formula)	corresponds to L3	

Lead time calculation slide: blocked URLNOVECARE LEAD MANAGEMENT PROCESS & TRAINING June 24

Diagram: https://app.diagrams.net/#G1ENQ0KTV8BssMDXrUaMOeC55-50pkv0gk#%7B%22pageId%22%3A%22RF_SfxDZwxAt96m-kJrV%22%7D



Campaign management

1. Record Types for Campaigns

There are 3 available Record Types for creating campaigns:

- Base Level - Channel,
- Mid Level - Asset,
- Top Level - Marketing

(NPS Campaigns are out of scope here).

Each Base Level Campaign must have the parent Mid Level campaign.

Correspondingly, each Mid Level Campaign must have a Top Level campaign as a parent.

1. Email alerts to Campaign Owners:

Workflow rules:

When the owner of the Base Level campaign changes - the New Owner of the Campaign receives an email with notification about ownership assignment.

The campaign owner also receives an email notification 7 days before projected end date of campaign that date is approaching

1. Campaign Influence Model

The Campaign Influence feature is enabled in Settings Feature Settings   Marketing Campaign Influence

The Auto-Association settings are set up to take into consideration only the Base Level - Channel record type campaigns and to exclude all campaigns with value “Operational” in the field type.

The only active model is **Even Distribution Model**

All influenced Opportunities for a particular campaign are shown in related list “Influenced Opportunities“

Only Opportunities created AFTER the campaign member have joined the campaign will be taken in account. (Based on 'tech first associated date' field)

1. Campaign layouts

Each type of campaign has its own page layout and lightning record page with a certain defined composition of sections and fields.

1. Types of campaigns and field dependencies

Each Type field of Campaign has certain picklist values available only for this particular type (note that “Operational” type here is the one that is excluded from Campaign Influence).

1. Net New Lead

“Net New Lead” Definition:

A person (an email) that was added to CRM as the result of a specific campaign (e.g. a form submission). Therefore, if that person (that email) is already in the system, it’s not a net new lead.

Net New Lead is a boolean field on the Campaign Member object.

From this follows that Boolean must be set to TRUE when:

1. a Lead has been created today and if that email does not matches any other Lead or Contact already in our database;
2. a Contact has been created today

12. ROI Calculation

The ROI amount is displayed on each individual base-level campaign as well as the total ROI for all base-level campaigns within a mid-level campaign. That allows us to judge if a marketing campaign (or a group of campaigns) has been financially successful.

Given that a campaign has influenced open and closed won opportunities (as determined by Campaign Influence), when those opportunities have values in Expected Yearly Revenues, then the sum of those values, each multiplied by the opportunity probability percentage and influence percentage, is to be displayed in the custom field “Influence Weighted” on the base-level campaign, and the sum of base-level campaigns' “Influence Weighted” fields belonging to a parent campaign is to be displayed in the custom field “Influence Weighted in Hierarchy” on Mid-level and Top-level campaigns.

Calculation:

We start with Probability Weighted Revenue field (SLV5_1_Probability_Weighted_Revenue__c) on each influenced opportunity (this is the value of SLV_Yearly_Revenues__c * Probability);

The we use Influence (%) (Influence) from the Campaign Influence object to get the proportion of Opportunity's Probability Weighted Revenue belonging to the Campaign;

Create new formula field in Campaign Influence (**Influence * Opportunity.SLV5_1_Probability_Weighted_Revenue__c**);

Finally, we write **the sum of all values** in Probability Weighted Revenue fields for each Opportunity influenced to the new **Influence Weighted** field on the Campaign object.

13. The default currency for all campaigns is set to Euro

All campaigns in a hierarchy must have the same currency hence EUR will be the currency set by default.

.