AFTERSALES LEAD MANAGEMENT
Process & Salesforce NEW MANUAL

Version 2022

INTRODUCTION

Welcome to the **new manual** on how to support the Aftersales Lead Management process in Salesforce.

Each topic can be selected from the Table of Contents to facilitate consultation of the document.

You can go back to the Table of Contents by clicking on the symbol in the top right-hand corner on any page.

Key:

- Important information
- Additional information
- Tip

Table of contents

ASLM Process - INTRODUCTION

The Aftersales Lead management process, introduced by Maserati in 2020, is designed to:

- Improve the Maserati Customer Experience by using dedicated digital tools
- Increase workshop traffic and business opportunities for Dealers
- Increase brand loyalty and customer satisfaction

A Lead is an ***opportunity***

The objective for the Dealer is to convert Leads into ***sales***

Salesforce is the tool chosen for the complete management and conversion of Aftersales Leads. Maserati network Dealers can:

- Intercept the Leads generated spontaneously by Customers through available channels (CUSTOMER-DRIVEN Leads)
- Receive Leads generated centrally by Maserati based on current campaign targeting (HQ-DRIVEN Leads)

This manual provides a comprehensive overview of the process to support Dealers in the day-to-day Aftersales Lead system management. It consists of several sections that can be consulted separately:

OVERVIEW OF THE PROCESS	**OPERATIVE LEAD MANAGEMENT (HOW-TO)**	**SLA & KPI**	**GLOSSARY**

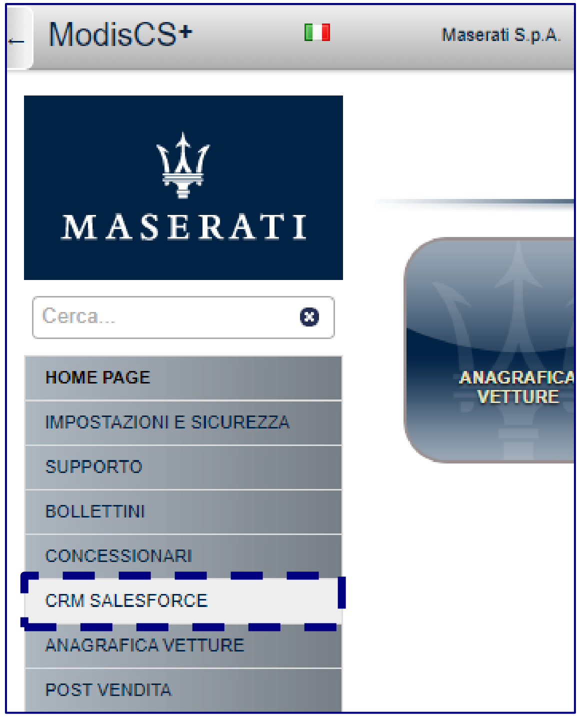
Process overview

- Access to Salesforce
- Lead views and tool navigation
- Lead overview

How to access Salesforce

Access Salesforce through MODIS CS+. To do this, log in to MODIS CS+ using your own credentials:

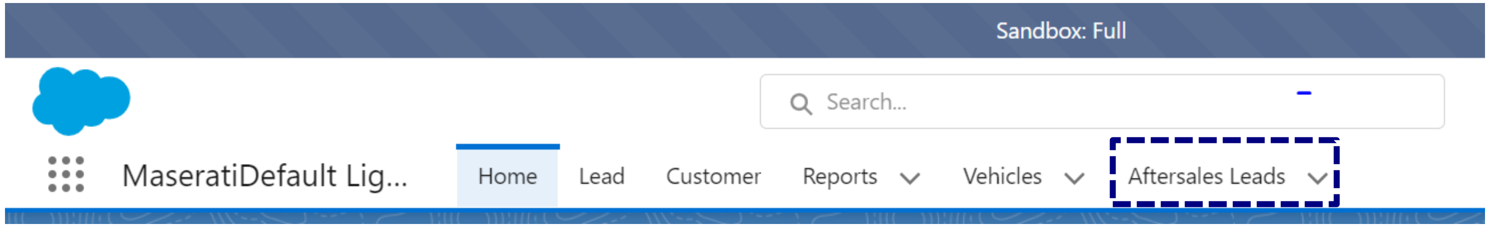
In the menu on the left, select CRM SALESFORCE to access the Salesforce home page.



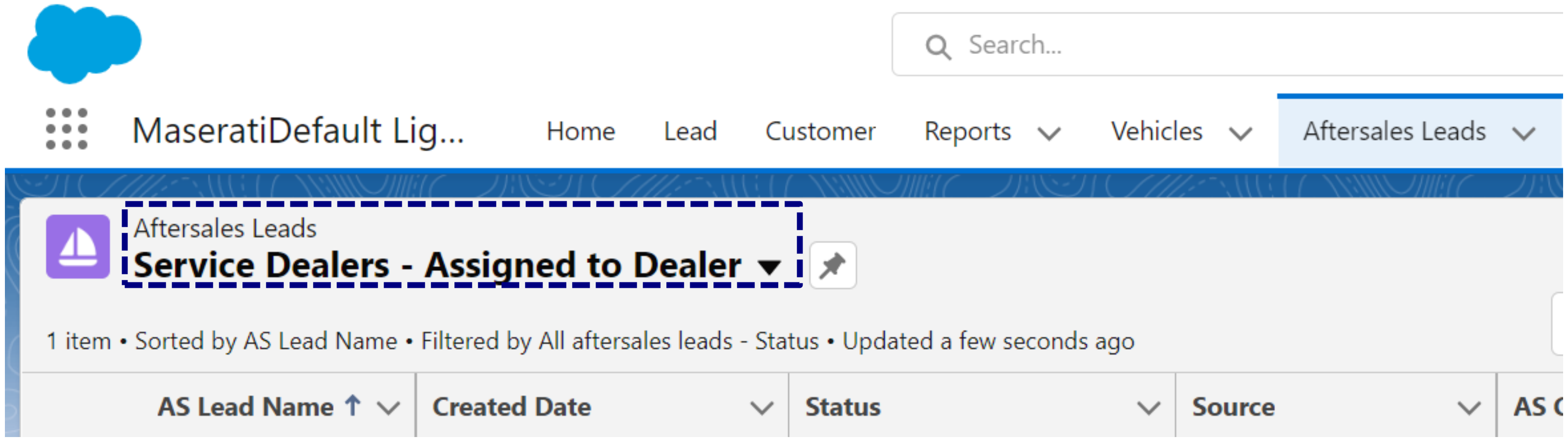
⚠ If you have more than one profile, select the Aftersales profile to continue:

SALESFORCE - Main page

On the Salesforce home page, select Aftersales Leads to go to the home screen.



Here you will see a list of the most recent Leads. The name of the Lead AS is the only available information.

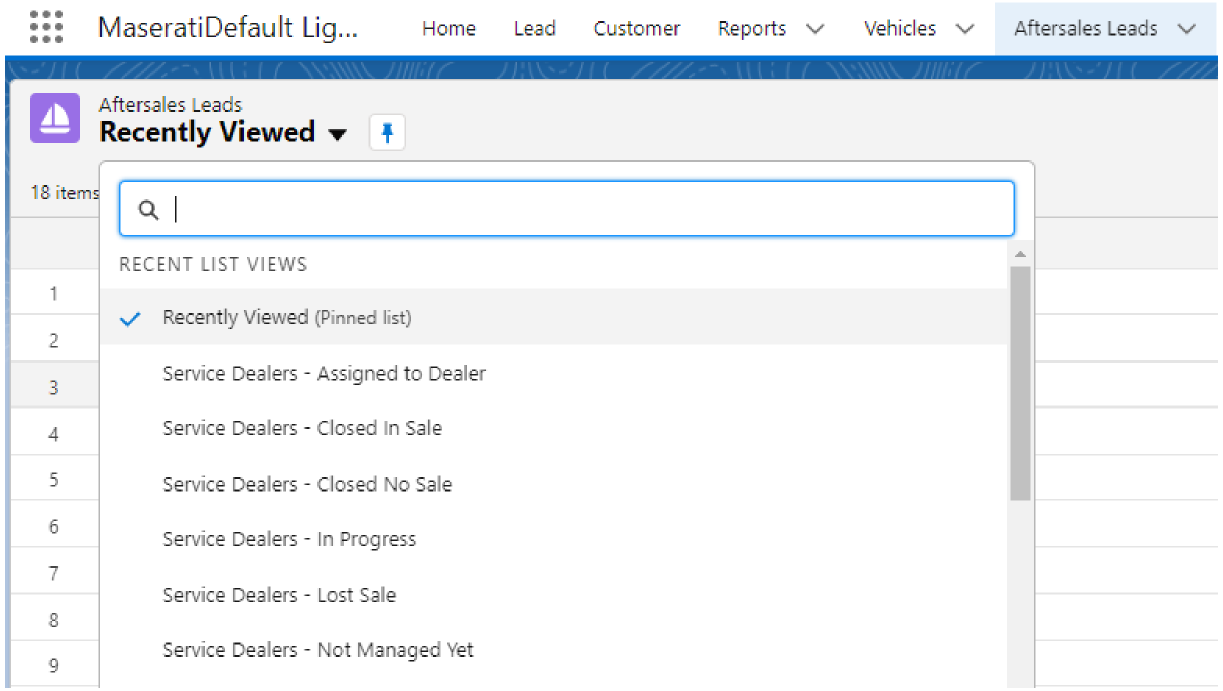


Proceed as follows to access the list of Leads waiting to be picked up and managed:

- in the **View** menu: select **Assigned to Dealer**.

SALESFORCE – List view

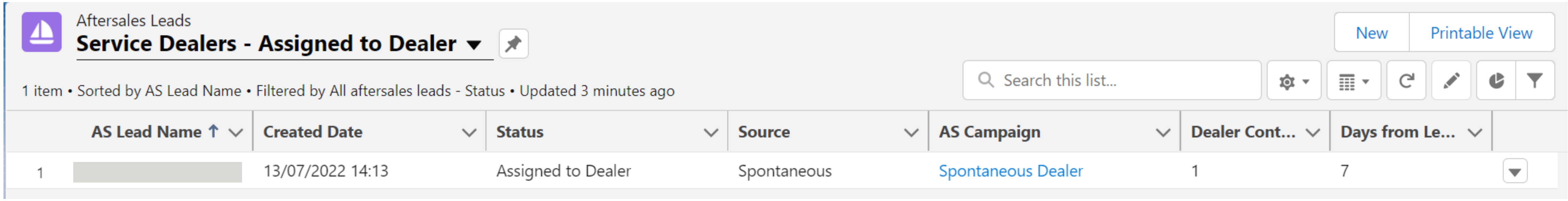
In the view menu, in addition to the list of leads in “Assigned to dealer" status, there are the following lists:



- **Closed In Sale:** the List View will show all the leads in “Closed In Sale” status and all the leads in “Appointment Taken” status;
- **Closed No Sale:** the List View will show all the leads with the “ Close No Sale Reason” field filled;
- **In progress:** the List View will show all the leads in “Assigned to Dealer” status with at least 1 “Dealer Contact Attempt”;
- **Lost Sale:** the List View will show all the leads in “Lost Sale” status;
- **Not Managed Yet:** the List View will show all the leads in “Assigned to Dealer” without any “Dealer Contact Attempt”;

SALESFORCE - View: Assigned to Dealer

The list of Leads in “Assigned to Dealer” Status provides the main information about the Lead:



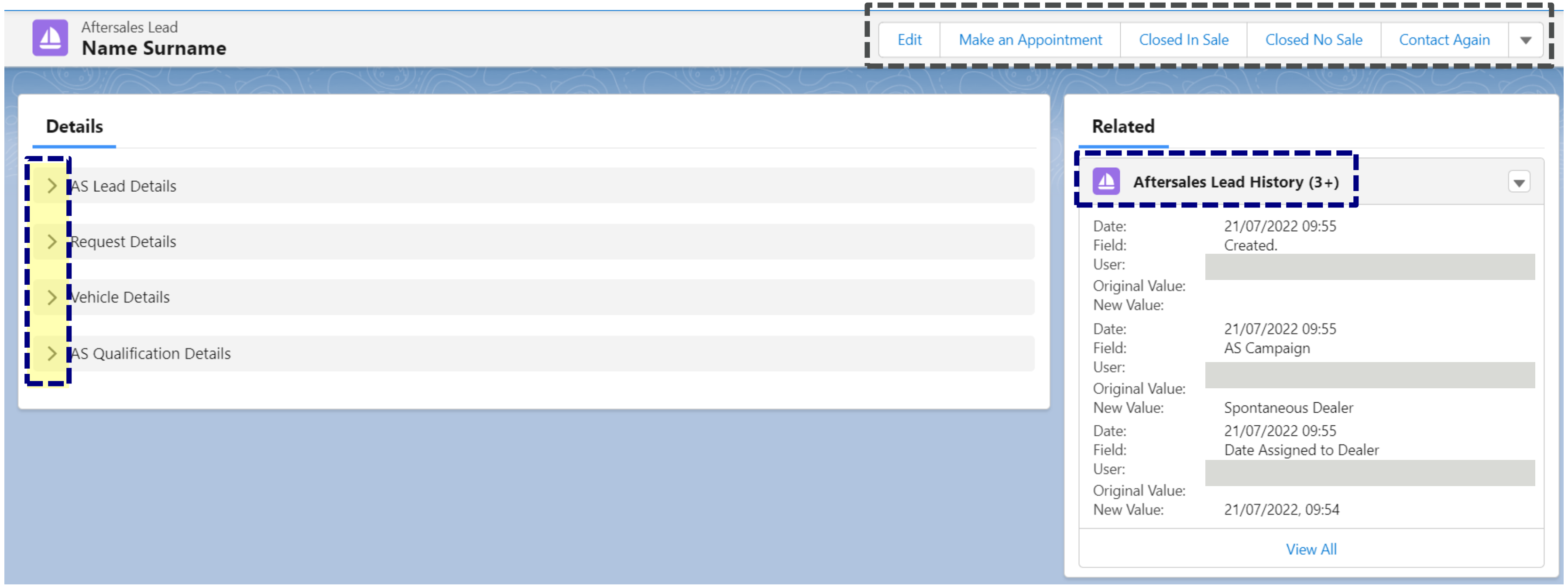
- **AS Lead Name:** name and surname of the Lead
- **Created Date:** The date on which it was created
- **Status** : This is always “Assigned to dealer” in this View
- **Source:** This indicates the source of the Lead, i.e., the channel through which it was generated
- **AS Campaign:** This indicates the respective Campaign (e.g.: Service Reminder / Seasonal Promo)
- **Dealer Contact Attempts Done:** Indicates the number of contact attempts done by the dealer
- **Days from Lead creation:** Indicates the number of days that have passed since the lead was created

To access the Lead page, simply click on the name in the AS Lead Name column

SALESFORCE – Lead main page

The Lead screen is divided into **4 sections** in addition to show the ACTION BUTTONS through which the Lead is managed

- AS Lead Details
- Request Details
- Vehicle Details
- AS Qualification Details



The "Aftersales Lead History" section that shows the history of the main changes made to the Lead during the management process is shown on the right side of the page.

SALESFORCE – Lead: "AS Lead Details" section

The "AS Lead Details" section contains detailed information about the Lead generated and assigned:

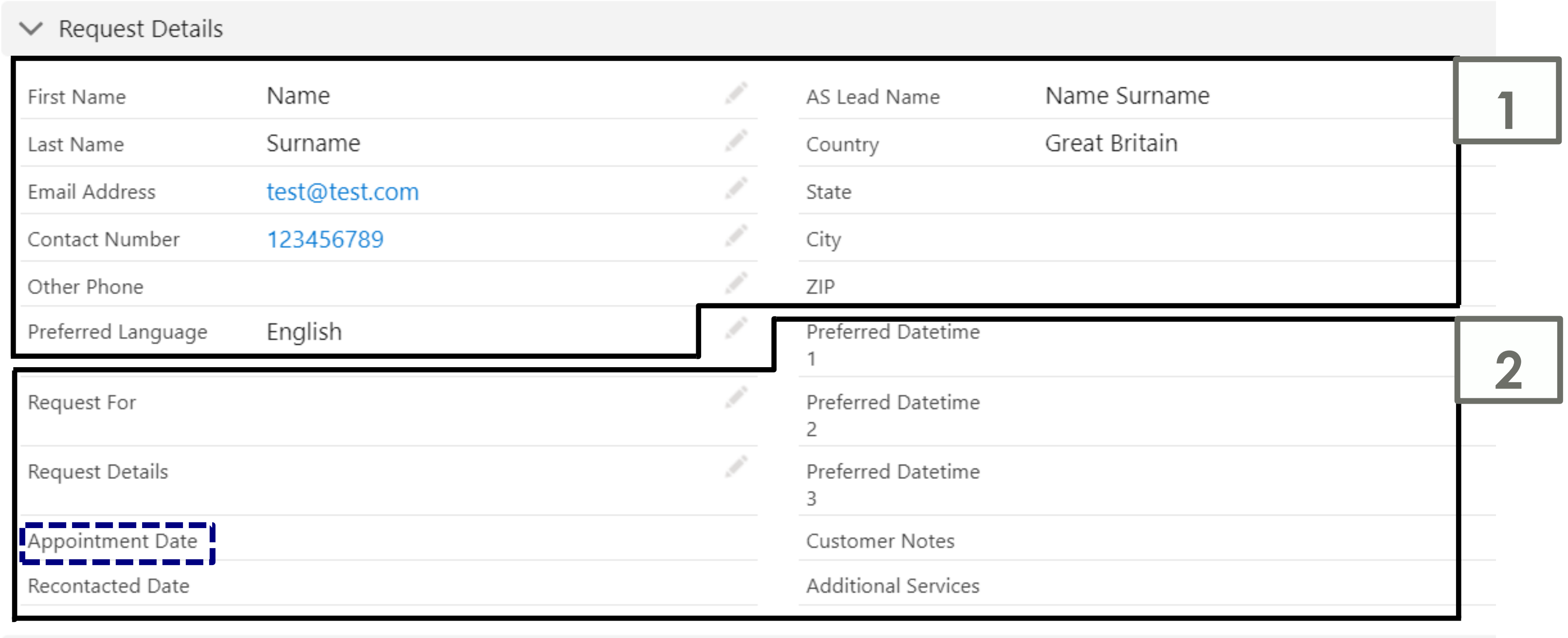
AS Lead Details

Status	Assigned to Dealer	Direct Marketing	Yes
AS Campaign	Warranty End Reminder	Profiling	Yes
AS Campaign Notes		by Email	Yes
Source	Spontaneous	by Phone	Yes
AS Lead Type	Customer Driven	by Post	Yes
Recontacted	☐	by SMS/MMS	Yes
Master AS Lead		by Fax	Yes
Days from Lead creation	0	by Social	Yes
Customer			
Personas Customer			

- **Source:** this provides information about the source of the Lead
- **AS Campaign:** this provides informs about the product/service of interest to the Lead (e.g. Warranty End Reminder)
- **AS Lead Type:** provides information about the type of source of the lead
- **Recontacted:** this checkbox, if flagged, reminds the dealer to contact the Customer and suggest a new appointment.
- **Customer Profiling & Marketing consents** information

SALESFORCE – Lead: "Request Details" section

It contains a set of information of various nature:



1 Customer information and contact details

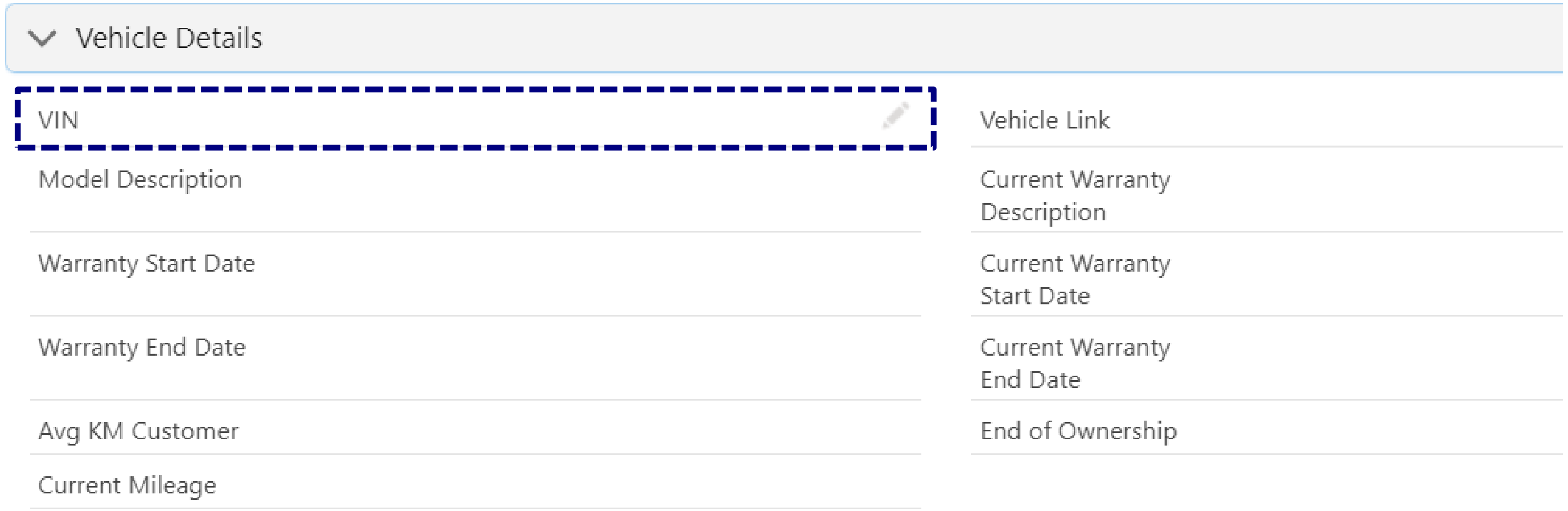
2 Preferences expressed by the Customer (Preferred Datetime 1-2-3) regarding the appointment and the APPOINTMENT DATE field in which to see the agreed appointment date.

"Request for" & "Request details" are information provided by the customer at the time of the request.
The "customer notes" provides information about notes leaved by the customer at the time of the request.

Entering an appointment will send 2 emails to the customer: The first confirmation (immediately), the second reminder (the day before the appointment). The same 2 emails are also sent to the Dealer

SALESFORCE – Lead: "Vehicle Details" section

This section collects information about the car:



Only the VIN field can be filled in, the other fields are filled in automatically.

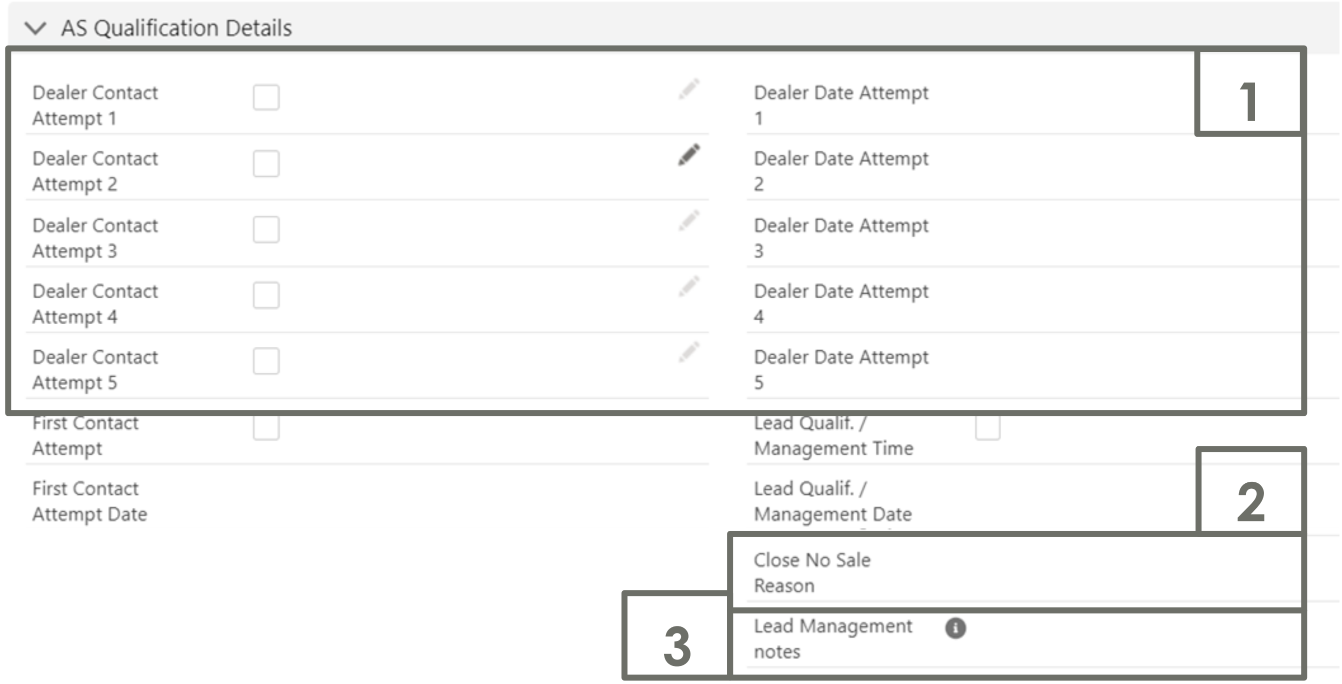
Entering the VIN is **<u>necessary</u>** to conclude the Lead management with "Closed In Sale"

The chassis number is already present for all HQ-DRIVEN Leads (generated by Maserati).

For CUSTOMER-DRIVEN Leads the chassis number may not be present because the Customer is not obliged to provide it.

SALESFORCE – Lead: “Qualification Details” section 1/4

The “Qualification Details” section can be used to manage the CONTACT and QUALIFICATION phases of the Lead.



1 These fields are dedicated to entering information relating to the CONTACT phase. You can enter **up to 5** contact attempts in Salesforce, but you **must record at least 1 contact attempt to change Lead Status**.

2 This field is dedicated to closing Leads for which no appointment could be fixed. The **Close No Sale** Status requires specifying the «Close No Sale Reason» for closing the Lead.

3 The field “Lead Management Notes” can contain the free notes of the dealer. The field is mandatory to close the lead “In Sale“ without an appointment or "No Sale" with **Close No Sale Reason – Other**.

Refer to the OPERATIVE LEAD MANAGEMENT (HOW-TO) section of this manual for details.

SALESFORCE – Lead: "Qualification Details" section 2/4

1 This section is dedicated to the recording of CONTACT attempts made by the Dealer

AS Qualification Details

Dealer Contact Attempt 1	☑	Dealer Date Attempt 1	21/07/2022 13:30
Dealer Contact Attempt 2	☐	Dealer Date Attempt 2	
Dealer Contact Attempt 3	☐	Dealer Date Attempt 3	
Dealer Contact Attempt 4	☐	Dealer Date Attempt 4	
Dealer Contact Attempt 5	☐	Dealer Date Attempt 5	
First Contact Attempt	☑	Lead Qualif. / Management Time	☐
First Contact Attempt Date	21/07/2022 13:30	Lead Qualif. / Management Date	

You can enter up to 5 contact attempts In Salesforce but you must make and record at least the first one(Dealer Contact Attempt 1).

Fields «First Contact Attempt» and «First Contact Attempt Date» will be automatically filled in when «Dealer Contact Attempt 1» is recorded.

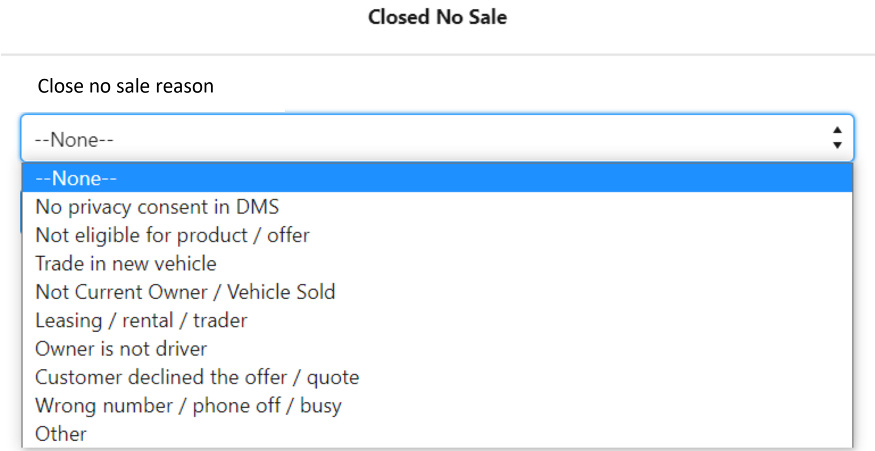
Use the appropriate button to save the contact information Save

Refer to the OPERATIVE LEAD MANAGEMENT (HOW-TO) section of this manual for details.

SALESFORCE – Lead: "Qualification Details" section 3/4

2 This section is dedicated to the recording of information on Lead management outcomes that do not result in an appointment. The management of these Leads may be completed by selecting the ACTION BUTTON **«Closed No Sale»**

By clicking on this Button, a popup will appear. Specify a **«Closed No Sale Reason»** for closing the Lead by selecting one of the available items from the list.



After selecting an item in a list it must be saved:

Refer to the OPERATIVE LEAD MANAGEMENT (HOW-TO) section of this manual for details.

OPERATIVE LEAD MANAGEMENT(HOW-TO)

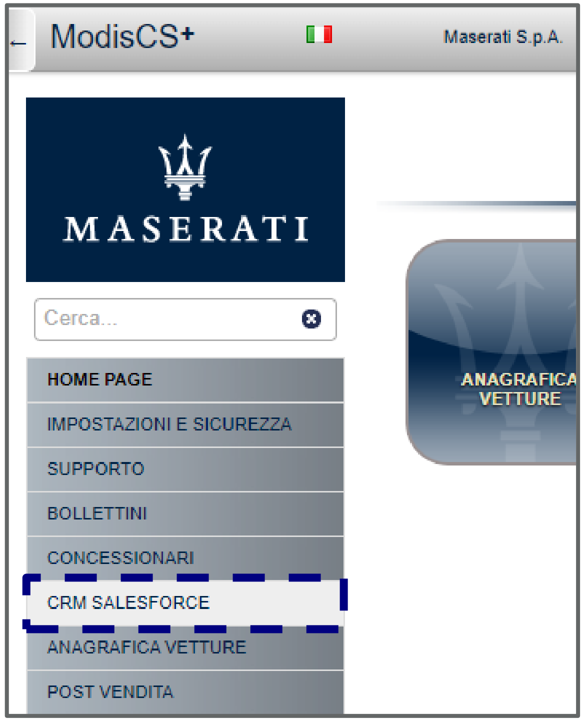
Complete the Lead management process in Salesforce

Access to Salesforce

- Access Salesforce from MODIS CS+ using your credentials.

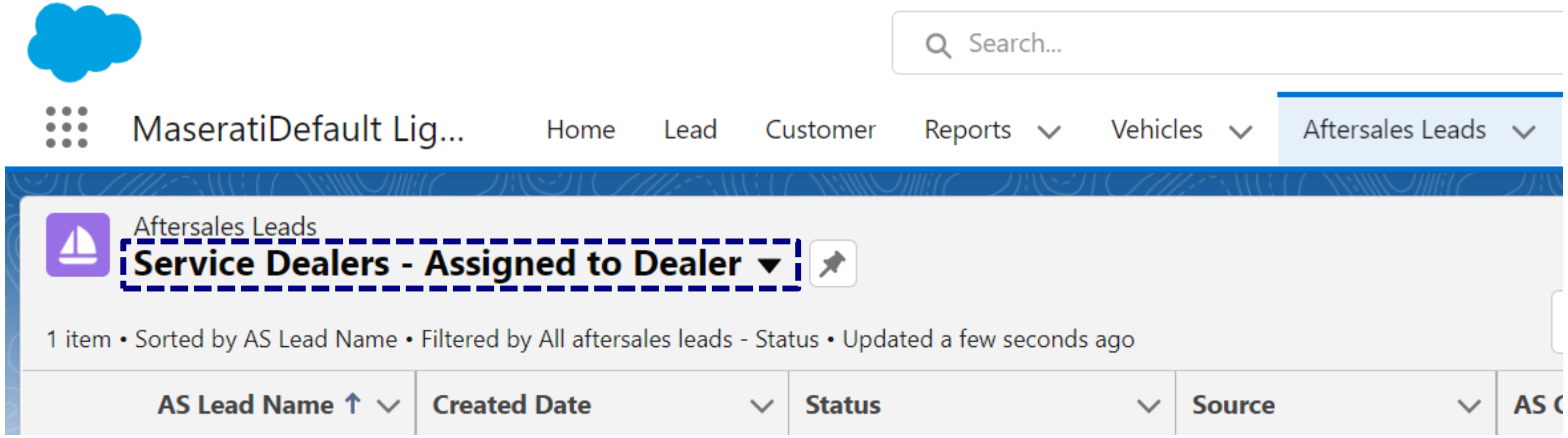
- Select the CRM SALESFORCE item to access the Salesforce main page.

⚠ If you have more than one profile, select the Aftersales profile to continue:



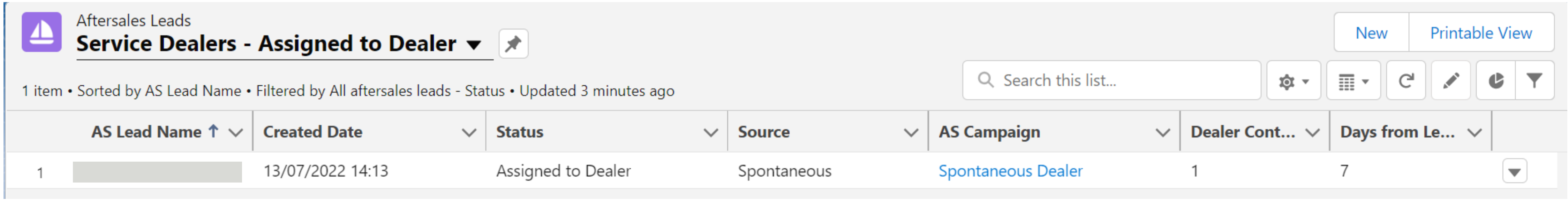
SALESFORCE - Main page

- Select Aftersales Leads from the main bar to access the home screen.



A list of the most recent Leads is shown here. Only the name of the AS Lead is available.

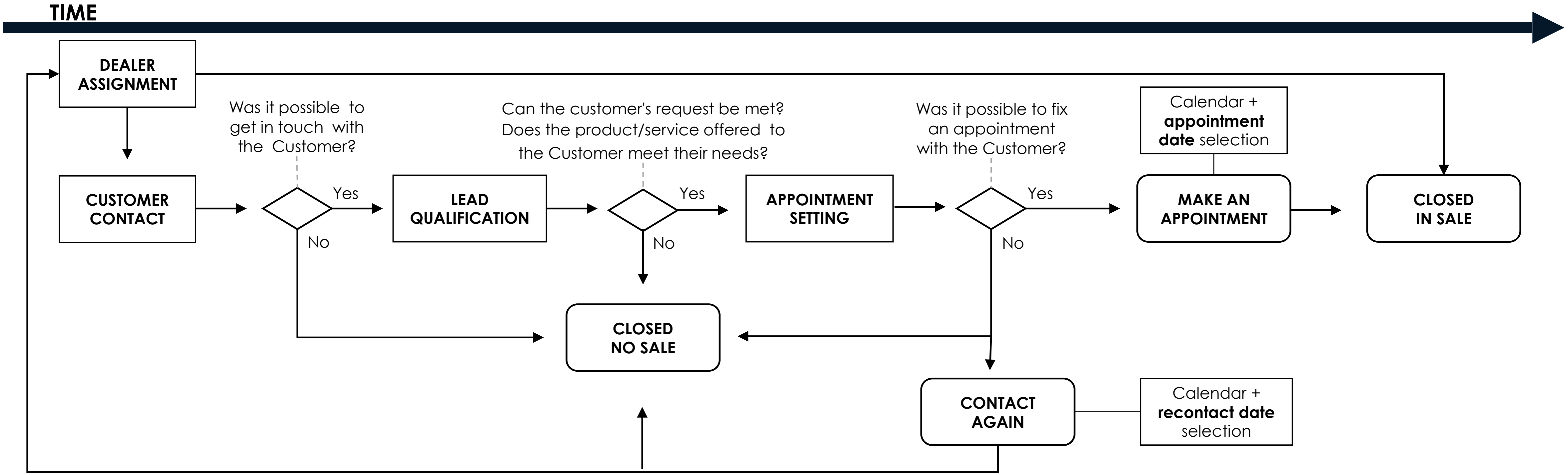
- Select **Assigned to Dealer** from the **"View"** menu to access the list of Leads waiting to be picked up
- Click on the name in the AS Lead Name column to start Lead management



ASLM - Process Overview

The Lead management process consists of several successive steps:

LEAD CONTACT - LEAD QUALIFICATION - APPOINTMENT - WORKSHOP VISIT



When managing the Leads, the aim is ideally to get the workshop to carry out the work or to sell a product/service. This is not always possible because going from one step to the next is possible only if the answer to each question is affirmative (◇).

Each Lead must be managed and closed (according to the achieved progress) by pressing the appropriate "ACTION BUTTON":

ASLM Process - LEAD CONTACT

⚠ **At least 1 contact attempt must be made and recorded** (Dealer Contact Attempt 1) in Salesforce in the Qualification Details section of the Lead being managed.

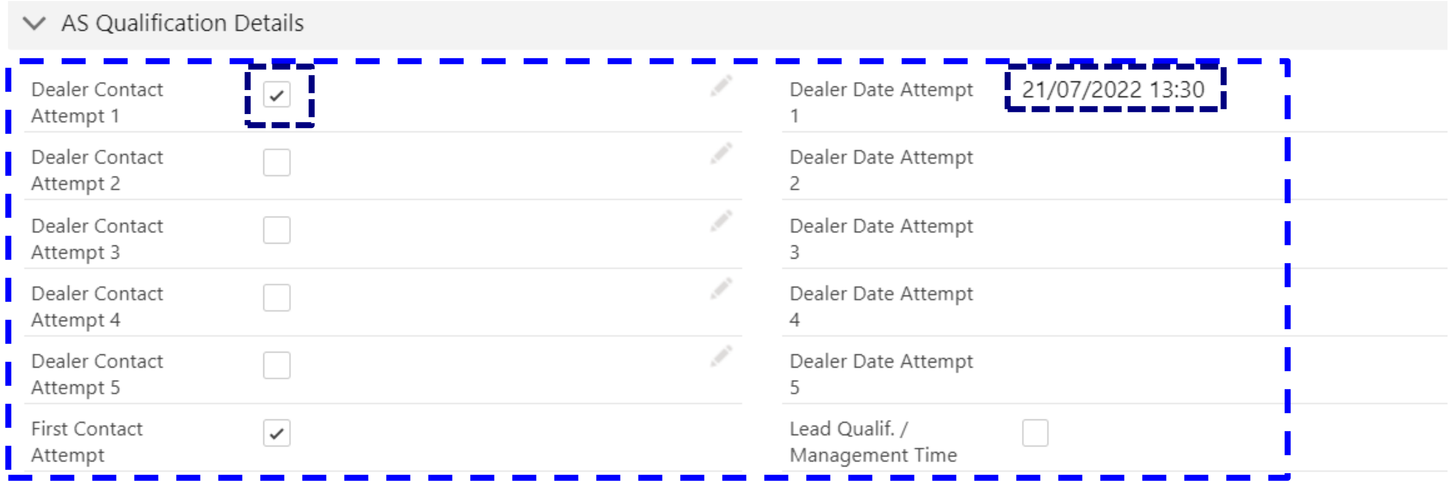
OPERATIONS:

1. Start with the first attempt to contact the Customer through the available channels (telephone, email, text message or other messaging systems).

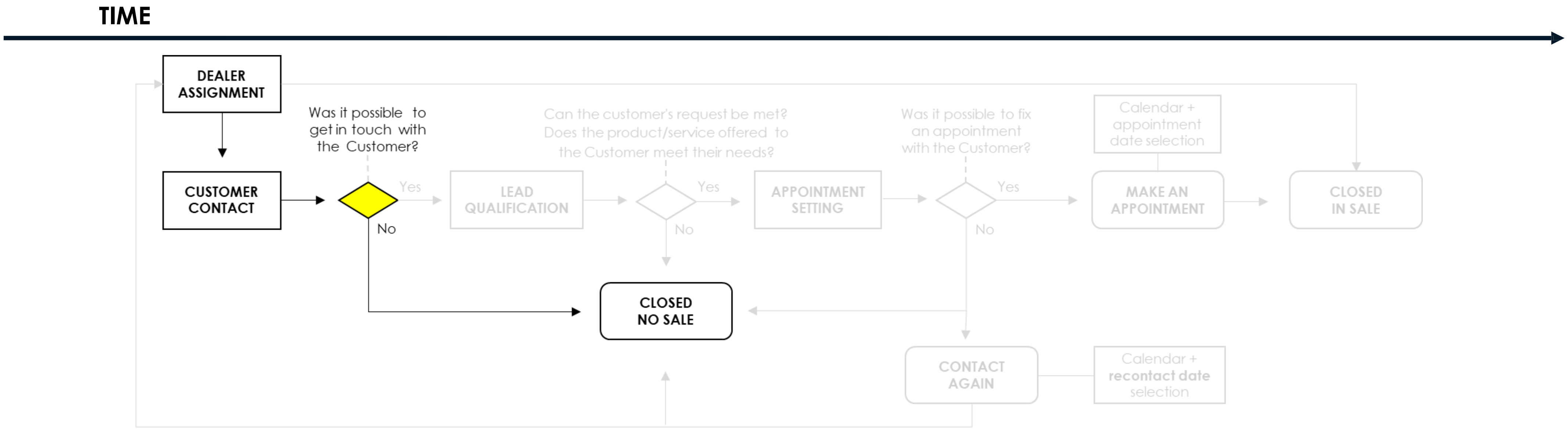
2. Record the contact attempt by double-clicking on the box and ticking the box

3. Save the contact attempt Save

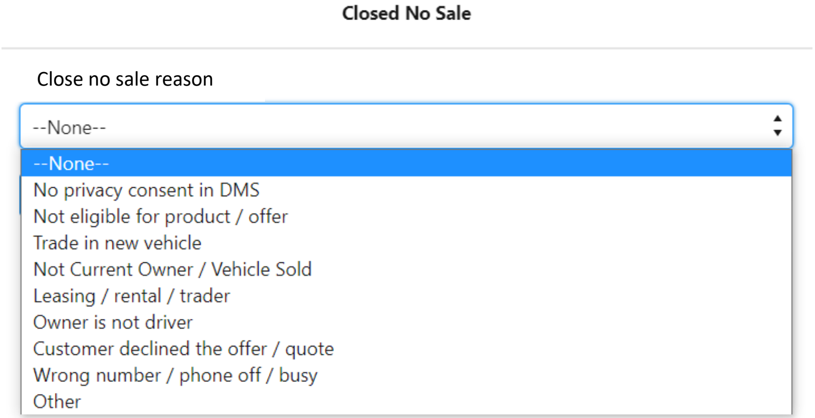
4. After saving, the date and time of the attempt are automatically entered in the corresponding "Dealer Date Attempt #" field



ASLM Process - LEAD CONTACT = KO



If after repeated attempts appropriately distributed over time (and recorded in Salesforce) you are unable to make contact with the customer, end Lead management with "**Closed No Sale**".



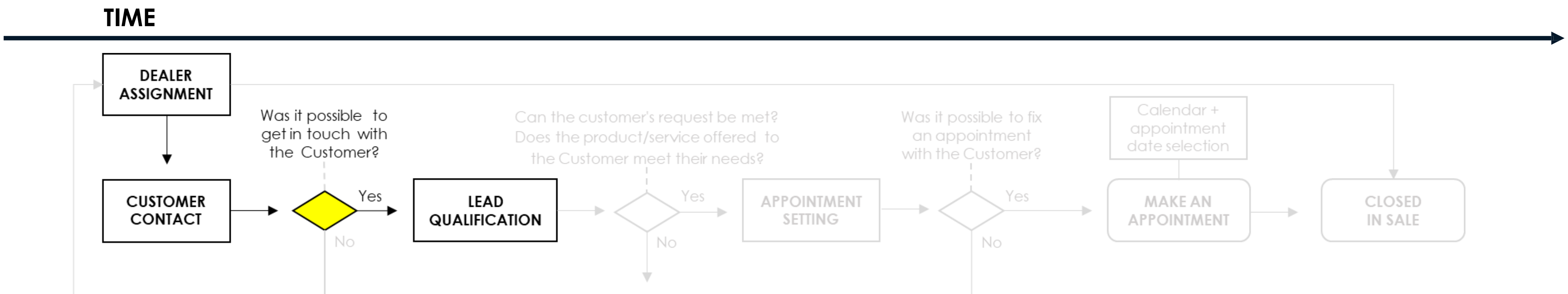
OPERATIONS:

1. Click on the "Close No Sale" button and select a reason Closed No Sale

2. Save by pressing Save

By selecting the reason «Other», it is **mandatory** to fill in the «Lead Management Notes» field.

ASLM Process - LEAD CONTACT = OK



The next step begins if you succeed in contacting the customer: **Lead Qualification**.

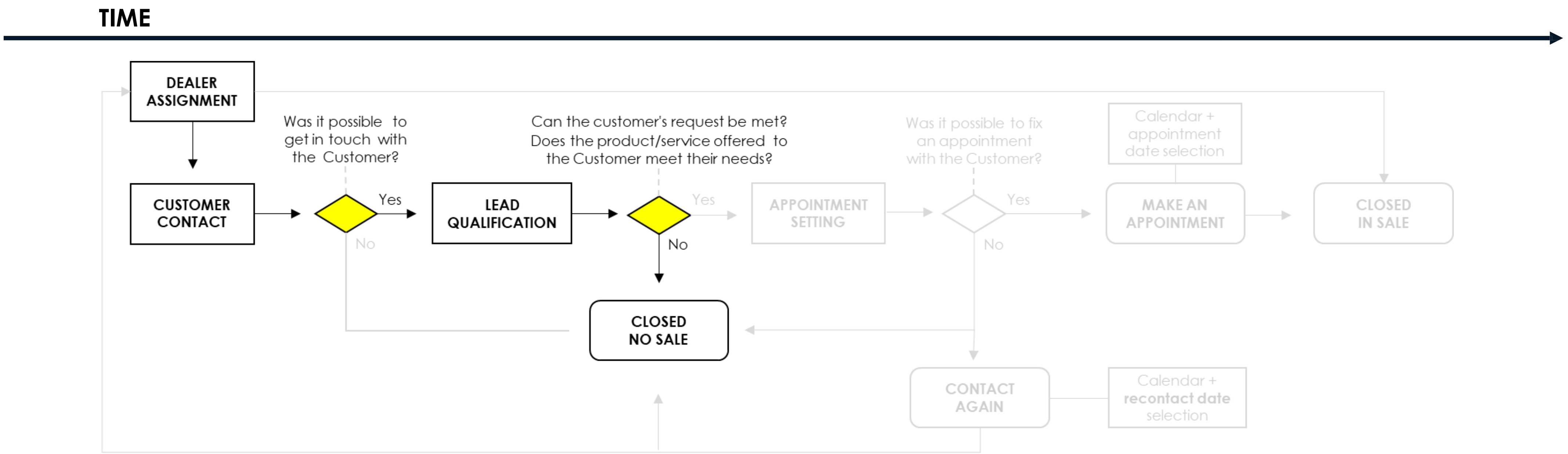
The qualification process is a **key moment** of the Lead management process and involves the active involvement of the Customer to:

- complete the definition of the customer's needs and requirements
- verify the customer's interest in the presented offer
- check the Customer's willingness to make an appointment with the Dealer

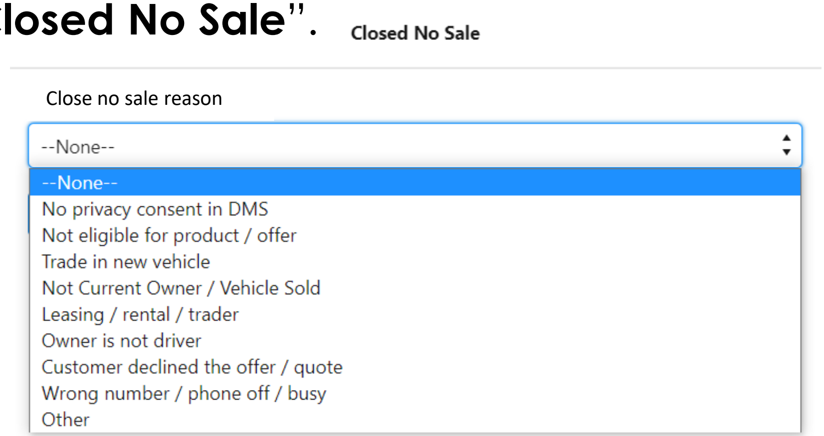
The qualification process starts when contact is made with the Customer and ends when all the elements necessary to be able to offer (or not) an appointment have been collected

Using the Customer and vehicle information available in the IT systems, the Dealer can pre-qualify the Customer before contacting them to increase the likelihood of success.

ASLM Process - QUALIFY LEAD = KO



If the qualification step ends with negative outcome, end the Lead as “**Closed No Sale**”.



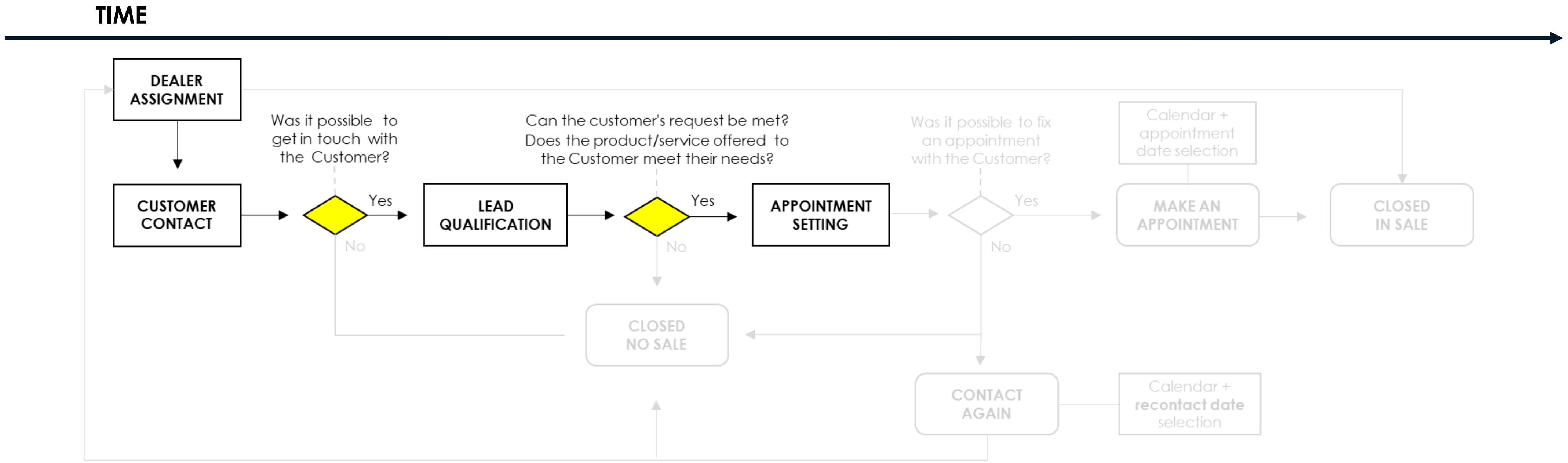
OPERATIONS:

1. Click on the “Closed No Sale“ button and select the reason Closed No Sale

2. Save by pressing Save

If the “Not Current Owner/Vehicle Sold” reason has been selected, in order to proceed and save the record, it will be necessary and mandatory to enter the end date of the ownership.
The Lead Status changes to “**Closed No Sale**” and the Lead management is ended

ASLM Process - LEAD QUALIFICATION = OK

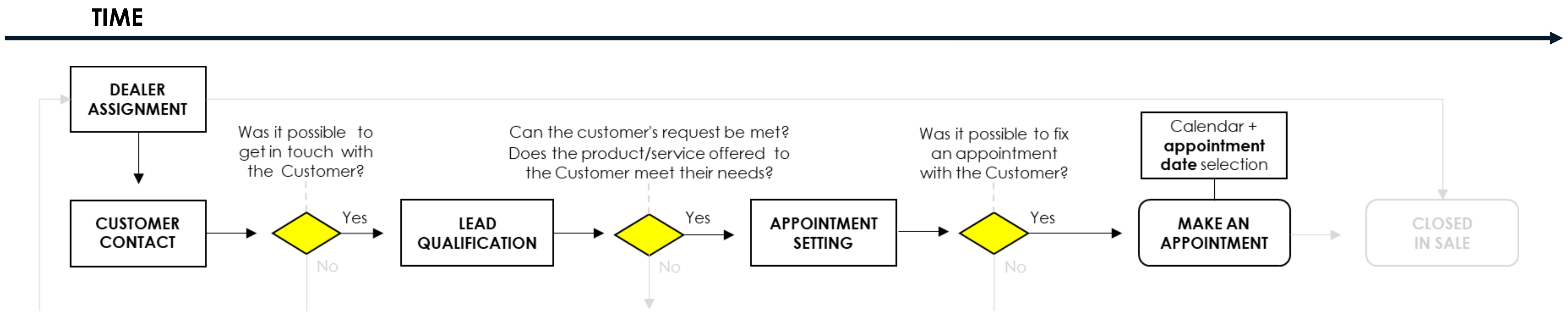


If instead, the Lead Qualification is successfully passed, i.e. all conditions are met to serve the Customer and the car:

- The Customer's car is included in offered/requested Campaign/Service
- The Customer is currently the owner of the associated car
- The timeframe for the request/offer can be respected

It is possible to proceed with the offer of an appointment agreed with the Customer.

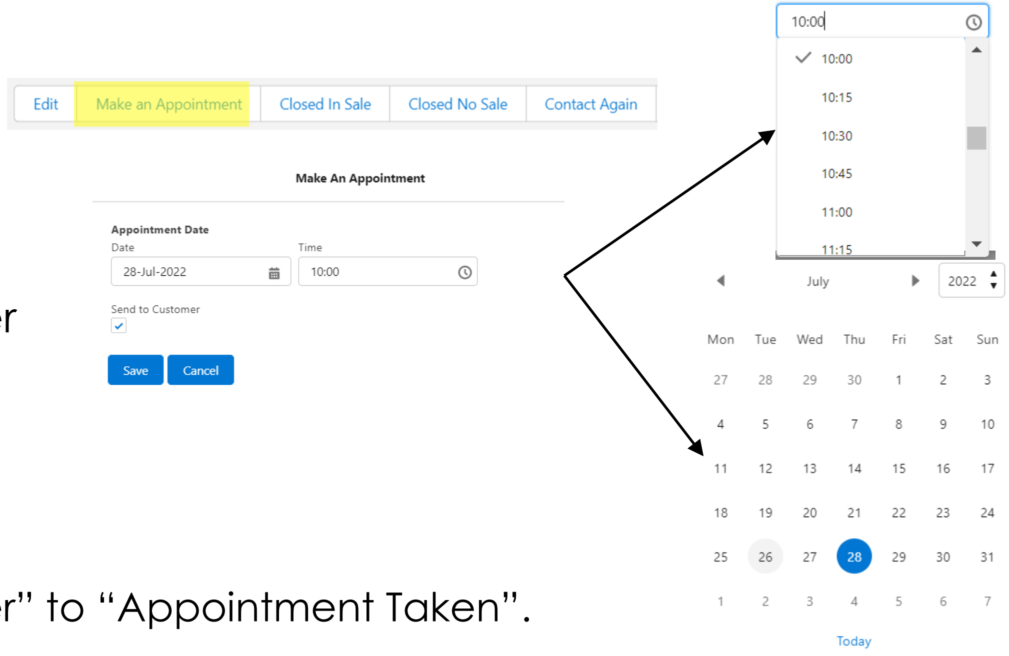
ASLM Process - APPOINTMENT = OK



If the Customer, after being **Contacted and successfully Qualified**, is interested in an appointment, proceed as shown to fix the appointment:

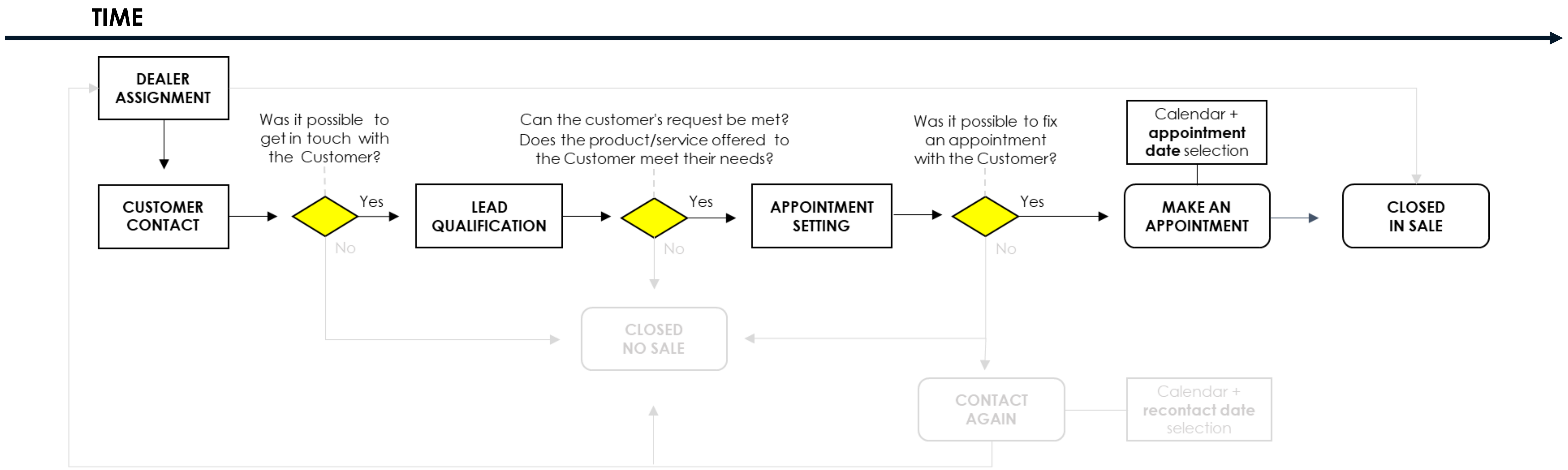
OPERATIONS:

1. Click on "Make An Appointment" button
2. Select the agreed appointment date and time; check the flag to send a reminder email to the customer
3. Confirm by pressing Save



The Status will automatically change from "Assigned to Dealer" to "Appointment Taken".

ASLM Process - APPOINTMENT = OK

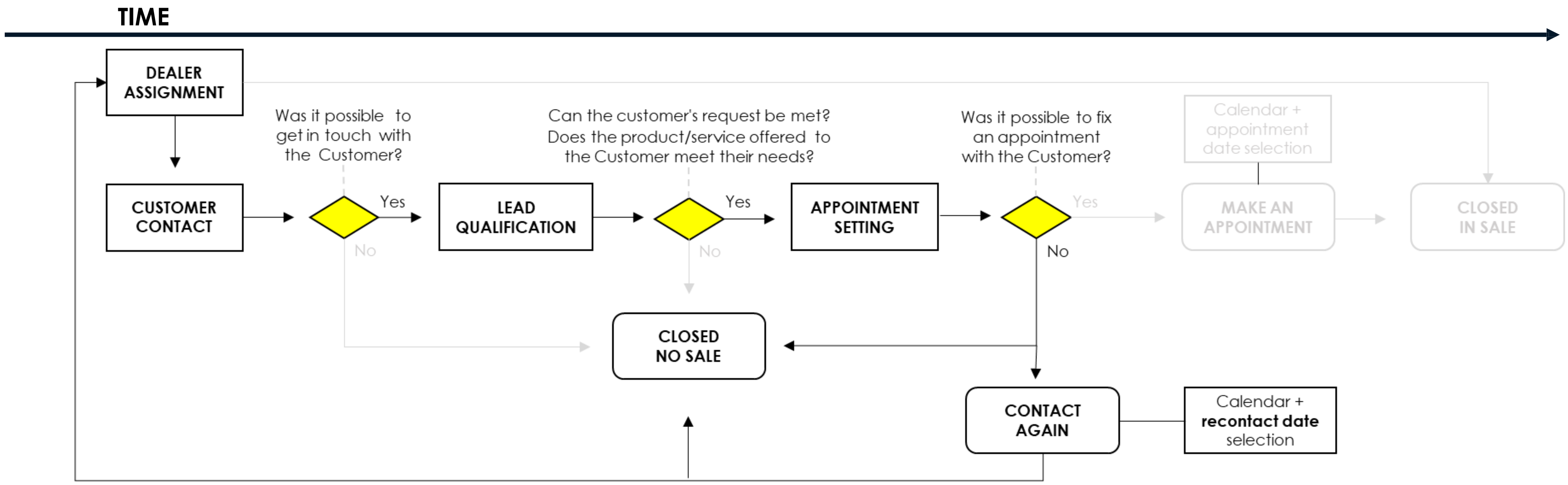


Once the customer's request is satisfied, the lead can be closed as "Closed In Sale" by entering a correct VIN as mandatory.

To modify an appointment taken click again on the “Make An Appointment" button, selecting the date and time of the new agreed appointment.

When the appointment is scheduled, checking the flag, Salesforce will send an email confirming the appointment to the Customer. A reminder email will be sent the day before the appointment.
Two equivalent emails will also be sent to the Dealer.

ASLM Process - APPOINTMENT = KO & CONTACT AGAIN

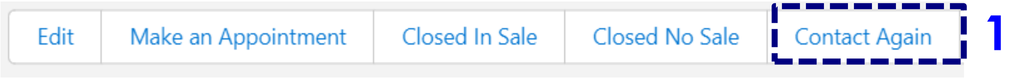


If the conditions for making an appointment are not met, end the Lead management as «Closed No Sale» selecting the same button.

However, a contact can be planned in the future with the Customer at a time when the offer might be more attractive (a Customer not interested today might be interested tomorrow!).

It is possible to plan a call-back contact with the Customer **whenever the Dealer sees the possibility of a future sale of products/services**.

ASLM Process - CONTACT AGAIN

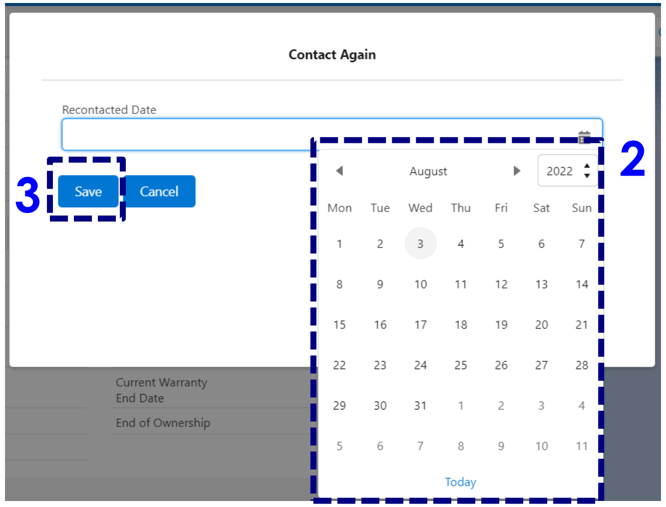


OPERATIONS:

1. Click the “Contact Again” button

2. Select the date of contact on the calendar

3. Confirm by pressing Save



The Lead Status changes to “Closed No Sale” with reason category “Not Interested Now” and “Contact Again” as Close No Sale Reason. The Lead management is ended.

Once the recontact date is reached, a new Lead will be created with “Assigned to Dealer” Status and with a checked flag on the checkbox “Recontacted”.
You can find the new lead in “Assigned to Dealer” list view, contact the Customer and suggest a new appointment.

You can still change the date/time manually after saving.

The new Lead will have the name of the previous Lead in the **Master AS Lead** field.
Select the name to display all the information about the original Lead.

SLA & KPI

Illustration of desired service levels in Aftersales Lead management

SLA - Service Level Agreement

One of the key elements of Lead management is certainly the time factor.

Timely contact demonstrates the attention Maserati pays to its Customers and maximises the Customer experience and loyalty.

The following SLAs have been implemented from 2022 to guarantee a level of Customer service in line with Maserati

standards and to monitor performance in the management of the Aftersales Lead.

First contact time → **Management time (Lead closure)** → **% Managed Leads (Lead closure)**

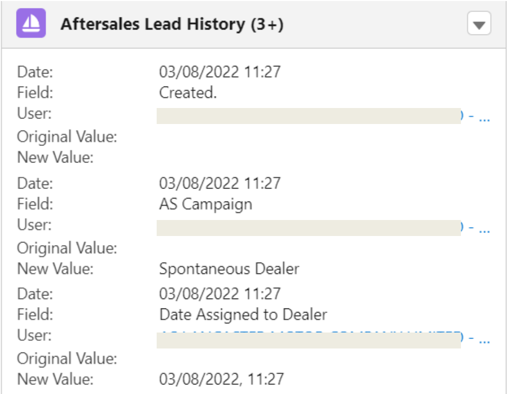
SLA 1 - Time of first contact

This measures the Dealer's promptness to pick up Lead management and indicates the time elapsed between when a Lead is assigned to the Dealer and the first attempt to contact the Customer.

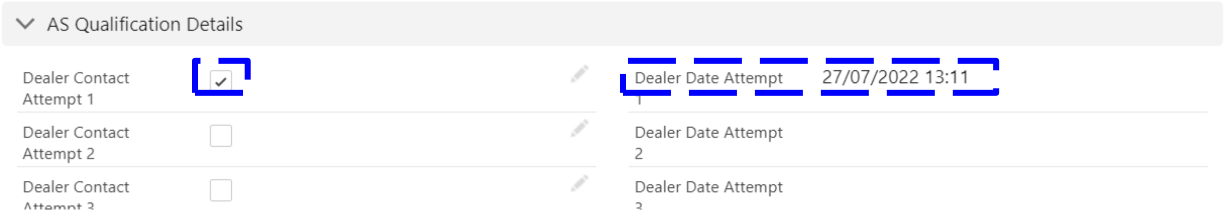
TARGET: 70% <= 1g (SLA: **70%** of assigned Leads must be contacted within 24 calendar hours of assignment)

KPI measurement: Date/time of first contact attempt - Date/time of Lead assignment

The **date/time of assignment** is visible
on the Lead page in the Aftersales Lead History section.



The **date/time of the first contact** is visible on the Lead page in the Qualification Details.



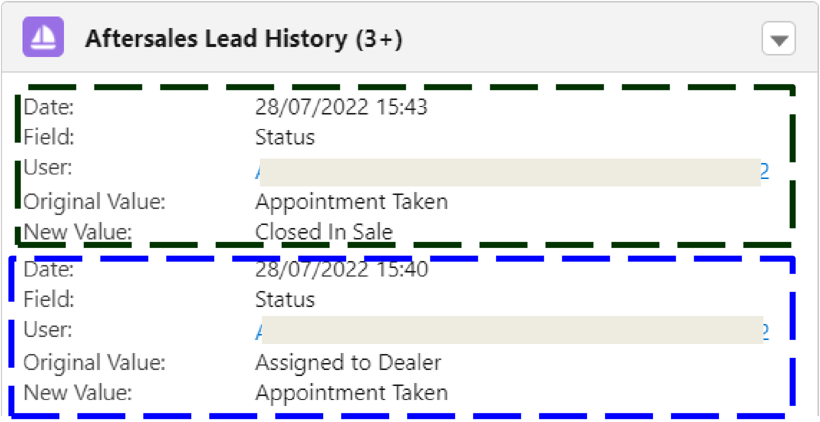
SLA 2 – Qualification/Management time

This measures the Lead management time and expresses the time elapsed between when the Lead is assigned to the Dealer and when the Lead is closed (which occurs when a final Status is assigned**).

TARGET: 70% <= 10g (SLA: **70%** of assigned Leads must be concluded within 10 calendar days of assignment)

KPI measurement: Date/time of Lead closure* - Date/time of Lead assignment

The assignment date/time (1) and the closure date/time (2) are visible on the Lead page in the Aftersales Lead History section:



2

1

* "Appointment Taken", within 60 days, is not a final Status and for this reason the Dealer can close the Lead (Closed In Sale) immediately after having fixed the appointment to respect the 10-day deadline. Insert a correct VIN is mandatory to close.

** Closed No Sale / Closed In Sale / Appointment taken

SLA 3 - Fully managed Leads

This measures the number of fully managed Leads (in final Status*) in relation to the total number of Leads allocated **during the previous 60 days**.

TARGET: 90% (90% of the Leads allocated in the previous 60 days must be in final Status* and therefore fully managed)

KPI MEASUREMENT: number of Leads in a FINAL Status / number of Leads allocated

* Closed No Sale / Closed In Sale

GLOSSARY

Explanation of the terminology related to Aftersales Lead management

GLOSSARY - Salesforce

ASLM After Sales Lead Management

LEAD A Customer who is the owner of a Maserati car and who may be interested in using a product or service offered by your Maserati workshop or who makes an explicit request to be contacted because they are interested in a product/service.
A Lead is a business opportunity for your dealership.

STATUS (of the Lead): This provides an indication of the progress of the Lead in the management process. It can be initial, intermediate or final. Leads in final Status have been fully managed and require no further action. Leads in Initial and Intermediate Status require further action to be brought to the final Status.

Assigned to Dealer (initial Status): All Leads, regardless of how they are generated or the type of campaign, are assigned to each Dealer in Salesforce, the tool through which the Leads must be actively managed by the Dealer. When they are created, Leads are in "ASSIGNED TO DEALER" Status indicating a new potential Customer to be contacted.

Appointment Taken
- *(intermediate Status):* This identifies the Lead for which an appointment has been made, it can only be finalised as "Closed In Sale" or "Closed No Sale", within 60 days.
- *(final Status):* If the lead is not managed within 60 days, "appointment taken" will become a final status.

Closed No Sale / Closed In Sale (final Status): The Leads identified by one of these Status are considered fully managed, and no further changes are possible. Each of these Status must be assigned to the Lead by the Dealer by using the ACTION BUTTONS.

ACTION BUTTON: A function buttons to be used to change the Lead Status in the management process.

LEAD CLOSURE is the point of arrival of the Lead management process. To conclude the management, one of the final Status must be assigned to the Lead (using the ACTION BUTTONS).

GLOSSARY – Lead Management Process

LEAD MANAGEMENT process

Each Lead starts with the "Assigned to Dealer" Status. The Leads in this Status must be managed and therefore require Dealer's intervention. The Lead management process consists of: Lead contact, Lead qualification, appointment and/or closure
To consider Lead management complete, the Lead must be assigned one of the FINAL Status in Salesforce using the ACTION BUTTONS.
A Lead in one of the final Status CANNOT be changed further because the management is considered to be completed.
Note: It is only possible to determine the FINAL Status to be attributed to each managed Lead after the contact and qualification steps.

LEAD CONTACT

This is the first and most important step of the Lead management process. It consists of getting in touch with the Customer, with the ultimate aim of transforming a potential interest into a concrete business opportunity. It can be done in different ways (e.g., telephone interview, exchange of e-mails or messages) but, unless the Customer expresses a preference, it should be done over the telephone. If the first attempt is unsuccessful, it is not advisable to make attempts close together in time, it is preferable to distribute the contact attempts over 2-3 days, taking care to select different time slots. A telephone call conveys a professional image and attention to the Customer and allows a more direct and effective exchange.

LEAD QUALIFICATION

Lead qualification means the process by which the customer's needs in terms of service requirements are determined and the actual possibility of meeting them is established. This implies the need for contact from the Dealer to the Customer. Only by coming into contact with the Customer is it possible to determine their needs, either manifest or not, and thus determine the subsequent fate of the Lead.

LEAD APPOINTMENT

The Status will automatically change to "Appointment Taken" for all Leads when previously agreed appointment is recorded in Salesforce.
The "Appointment Taken" Status, within 60 days, is not a FINAL Status and therefore requires further action by the Dealer.
It is necessary to assign the FINAL "Closed In Sale" or "Closed No Sale" Status to conclude the management of these Leads.

GLOSSARY - Lead classification

Customer-Driven Leads are originated from a specific contact request by the Customer. The digital channels through which the Customer can request to be contacted about a product/service of interest are essentially the web forms on the Maserati institutional websites and the Maserati Owner App. These Leads must be handled as a priority because the Customer has made a request and expects to be contacted as soon as possible.

HQ-Driven Lead Maserati periodically analyses the current vehicle fleet and, based on a series of parameters, identifies Customers who might be interested in receiving a particular offer.
The Customer has not actively expressed any request, but may be interested in the offer coming from Maserati. Examples are the Service Reminder and Warranty End Reminder campaigns.

Not Managed Yet
Leads assigned to the Dealer but not taken over (no activity carried out). They are distinguished by the "Assigned To Dealer" Status.

In Progress
Leads that are partially managed but have not yet reached Final Status. They are marked by the "Assigned To Dealer" or "Appointment Taken" Status In Salesforce.

Closed In Sale
All Leads which have reached a FINAL Status of Closed In Sale which (with the exception of Lost) are therefore considered to be fully managed.

Closed No Sale
All Leads which have reached a FINAL Status of Closed No Sale which (with the exception of Lost) are therefore considered to be fully managed.

Lost
Subgroup of **Closed** Lead marked in Salesforce by the "Lost Sale" Status. This Status is automatically assigned by the system to Leads for which a final Status is not reached within 60 days of the assignment date.