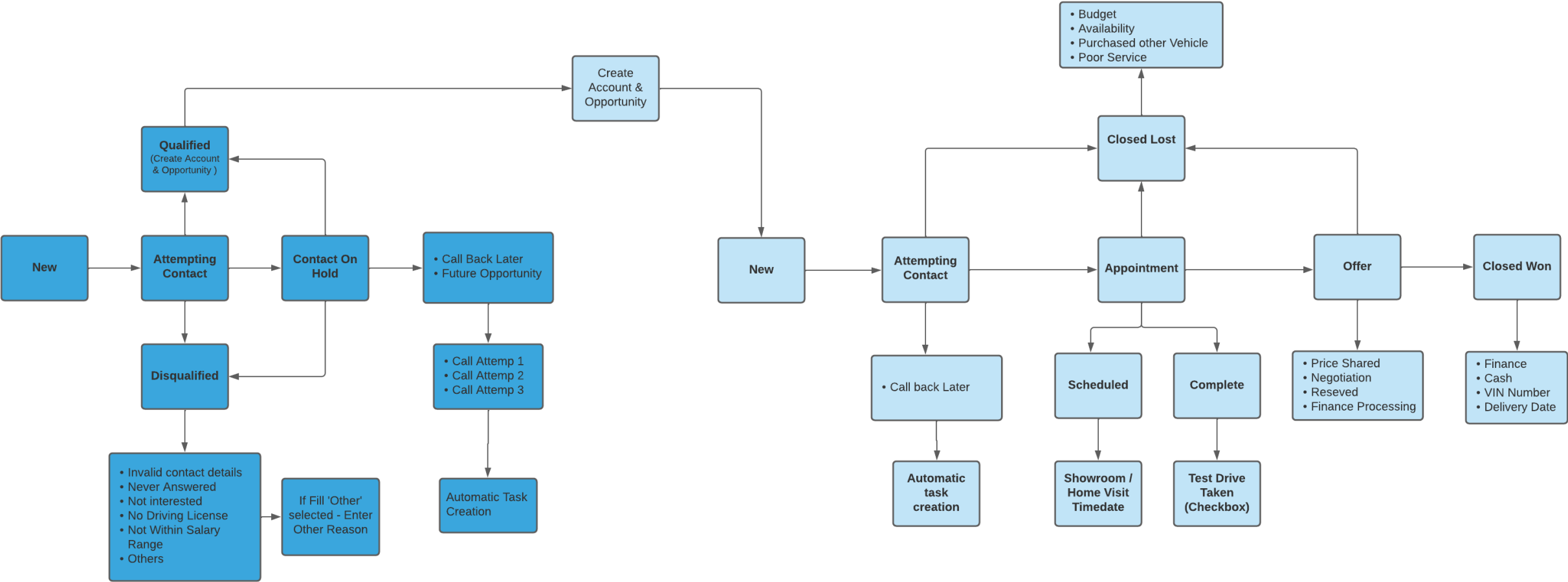




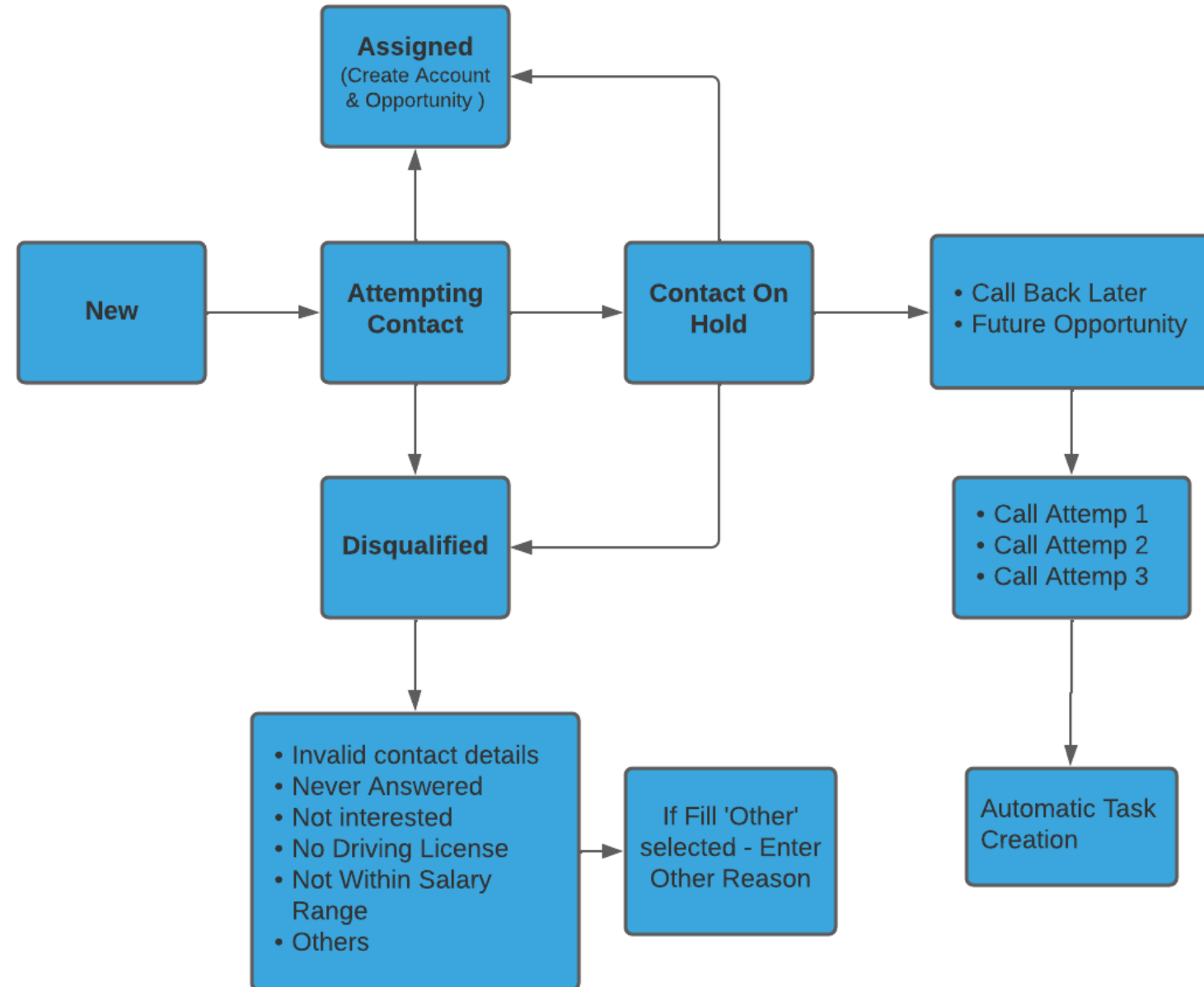
# SALESFORCE CLOSED LOST SUB-STAGES

July 2022

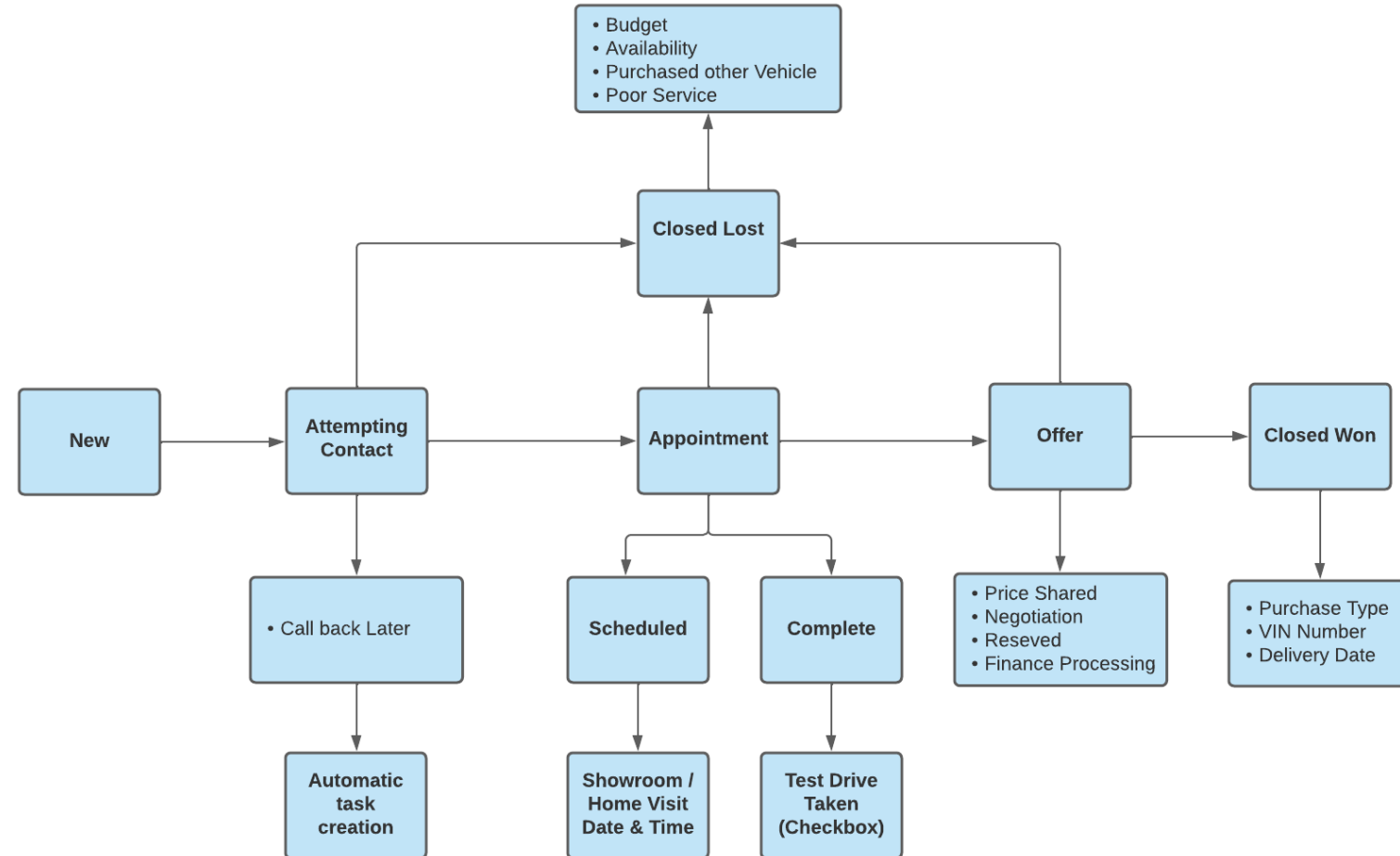


The following flow chart shows the process of lead qualification, conversion to an opportunity, appointments, offers, and closure.

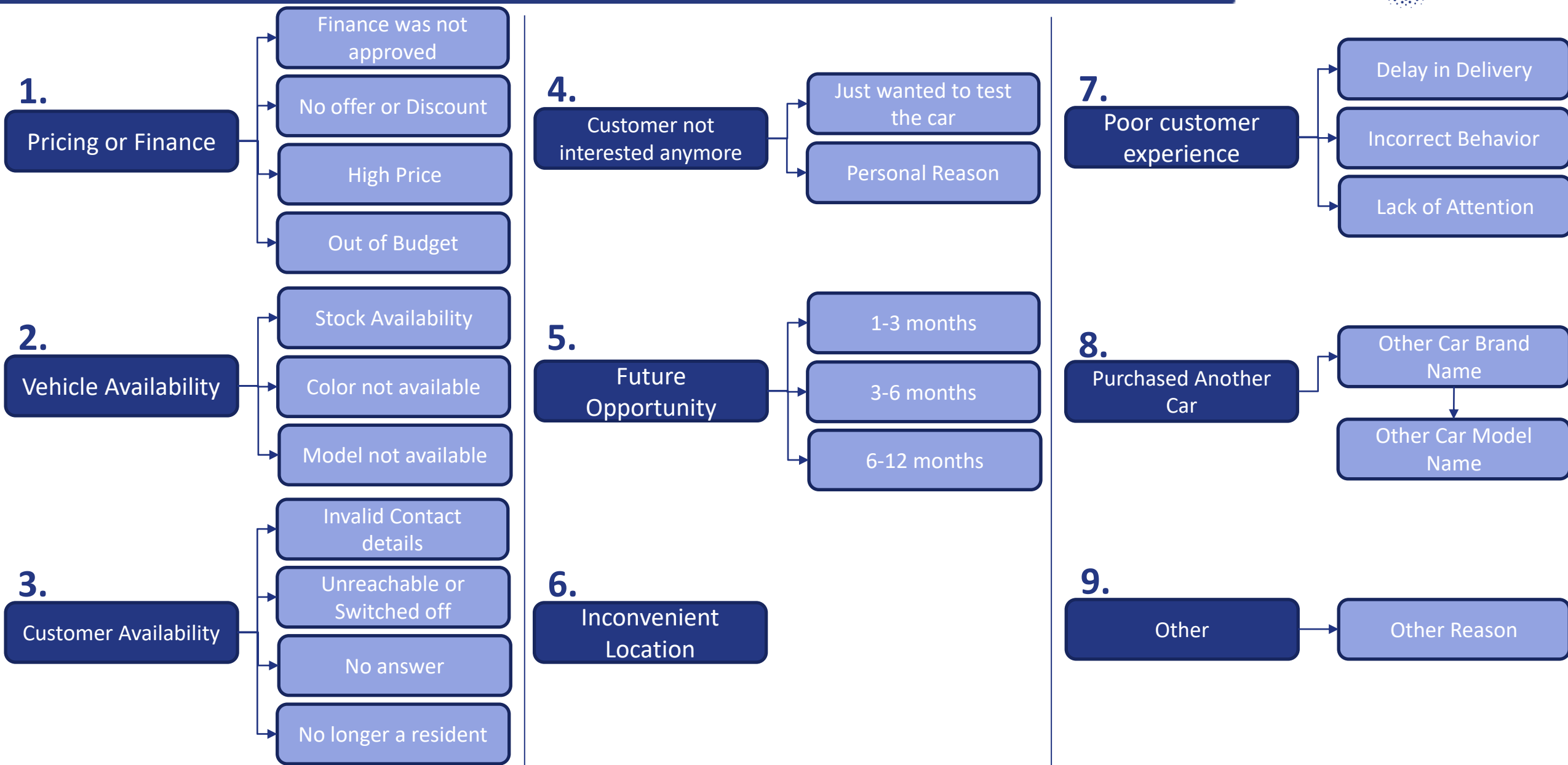
1. **New:** When the record is created automatically from the website or social media or manually on Salesforce, the default status will be shown as New.
2. **Attempting Contact:** Once you start working on qualifying and attempt contacting the lead, you should select Attempting Contact status.
3. **Contact On Hold:** If the lead wants you to call them back later or this is a potential future opportunity, you should select Contact On Hold status. You can fill the Call Back Later time that will automatically create a task for you to follow up with your lead.
4. **Assigned:** If the lead is genuine, has shown interest in the vehicle and wants to move forward, select Assigned as a status and convert the lead to opportunity.
5. **Disqualified:** If the lead wasn't successful in conversion, please select Disqualified as a status and specify the reason. If the reason was not listed in the dropdown, please select others and fill the free text field.



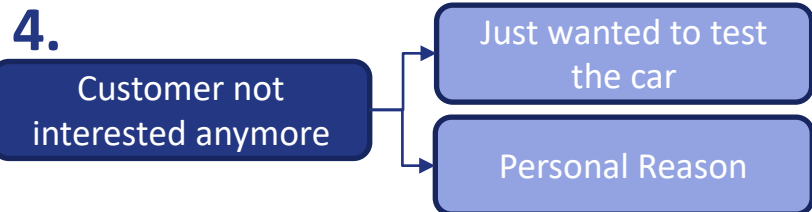
1. **New:** When the record is converted, the default stage will be shown as New.
2. **Attempting Contact:** If the customer didn't reply or wants you to call them back later, you should select Attempting Contact stage. You should fill the Call Back Later time that will automatically create a task for you to follow up with the customer.
3. **Appointment:** You can schedule an appointment with your customer, enter preferred date and time, select the test drive type. Select Complete once the appointment is done and specify if the test drive was taken or not.
4. **Offer:** If the price was shared and/or negotiating finance, select Offer as a stage.
5. **Closed Won:** If the customer purchased the vehicle, select Closed Won as a stage. You should fill the way of payment the delivery date and Vin number.
6. **Closed Lost:** If the purchase didn't happen select Closed Lost as a stage and specify the reason. If the reason was not listed in the dropdown, please select others and fill the free text field.



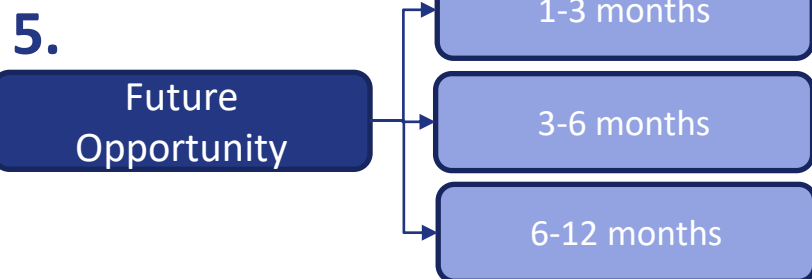
## Opportunity – Closed Lost Sub-stage & Sub-stage Reason



|    |                       |   |   |
|----|-----------------------|---|---|
| 1. | Pricing or Finance    | <ul style="list-style-type: none"> <li>Finance was not approved</li> <li>No offer or Discount</li> <li>High Price</li> <li>Out of Budget</li> </ul>             | <p><b>1. Pricing or Finance</b> is a sub-stage used when opportunity is lost due to money, be it cash, finance, price and/or budget</p> <ul style="list-style-type: none"> <li>I. Finance was not approved is used when all documents are submitted to a bank and the bank rejects it for any reason (low salary, high commitments, ....)</li> <li>II. No offer or Discount is used when there are no offers and/or discounts on the selected vehicle</li> <li>III. High Price is used when the actual price of the vehicle is high even if it is in customer's budget (he/she has the money to purchase but the price itself is high)</li> <li>IV. Out of Budget is used when the customer can't afford to purchase the vehicle</li> </ul> |
| 2. | Vehicle Availability  | <ul style="list-style-type: none"> <li>Stock Availability</li> <li>Color not available</li> <li>Model not available</li> </ul>                                  | <p><b>2. Vehicle Availability</b> is a sub-stage used when opportunity is lost due to availability</p> <ul style="list-style-type: none"> <li>I. Stock Availability is used when the vehicle is not in stock and will not be imported in the very near future</li> <li>II. Color not available is used when the color of the vehicle the customer interested in is not available</li> <li>III. Model not available is used when the model (specific trim) of the vehicle the customer interested in is not available</li> </ul>   |
| 3. | Customer Availability | <ul style="list-style-type: none"> <li>Invalid Contact details</li> <li>Unreachable or Switched off</li> <li>No answer</li> <li>No longer a resident</li> </ul> | <p><b>3. Customer Availability</b> is a sub-stage used when opportunity is lost due to the unavailability of the customer when trying to connect or call</p> <ul style="list-style-type: none"> <li>I. Invalid Contact details is used when the mobile is reachable however the number contacted is wrong</li> <li>II. Unreachable or Switched off is used when the call is directly disconnecting, not ringing or switched off</li> <li>III. No answer is used when the phone is ringing but the customer is not picking up or answering the phone</li> <li>IV. No longer a resident is used when the customer is no longer a resident in the country after raising the request</li> </ul>   |



- 4. Customer not interested anymore** is a sub-stage used when opportunity is lost due to the customer changing his/her mind or losing interest
- Just wanted to test the car is used when the customer is test driving the car to try it without the true intent of purchasing
  - Personal Reason is used when the customer doesn't want to share the reason of his/her loss of interest



- 5. Future Opportunity** is a sub-stage used when opportunity is lost due to the intent of buying in the near future rather than buying immediately. *Note: this should only be used when the time is more than 30 days otherwise don't mark the opportunity as 'Closed Lost'*
- 1-3 months is used when the customer is willing to buy within 1 to 3 months
  - 3-6 months is used when the customer is willing to buy within 3 to 6 months
  - 6-12 months is used when the customer is willing to buy within 6 to 12 months



- 6. Inconvenient Location** is a sub-stage used when opportunity is lost due to the inconvenient location of the showroom for being far from the customer, no 'Sub-stage Reason' is required here

|   |   |
|---|---|
| <p><b>7.</b></p> <p>Poor customer experience</p> <ul style="list-style-type: none"> <li>Delay in Delivery</li> <li>Incorrect Behavior</li> <li>Lack of Attention</li> </ul> | <p><b>7. Poor customer experience</b> is a sub-stage used when opportunity is lost due to the dissatisfaction of the customer service</p> <ol style="list-style-type: none"> <li>Delay in Delivery is used when the car is not delivered on time as previously communicated to customer</li> <li>Incorrect Behavior is used when the customer is treated unprofessionally. <i>Note: this should be escalated to and followed up by the branch manager</i></li> <li>Lack of Attention is used when the sales executive didn't follow up with the customer as needed</li> </ol> |
| <p><b>8.</b></p> <p>Purchased Another Car</p> <ul style="list-style-type: none"> <li>Other Car Brand Name</li> <li>Other Car Model Name</li> </ul>                          | <p><b>8. Purchased Another Car</b> is a sub-stage used when opportunity is lost due to customer purchasing another vehicle, when selected, there will be 2 text fields required to be filled with the Brand and Model name of the vehicle that the customer purchased</p> <ol style="list-style-type: none"> <li>Other Car Brand Name</li> <li>Other Car Model Name</li> </ol>  |
| <p><b>9.</b></p> <p>Other</p> <ul style="list-style-type: none"> <li>Other Reason</li> </ul>  | <p><b>9. Other</b> is a sub-stage used when opportunity is lost due to any reason which is not specified above, when selected, there will be a text field 'Other Reason' to be filled</p> <ol style="list-style-type: none"> <li>Other Reason</li> </ol>  |





THANK YOU