Manual Lead Management for Q.PARTNER

Functional principle:
The Lead Management gives you the opportunity to claim and process inquiries from potential customers, received via the Q CELLS Solar Calculator.

Step 1: View of available leads in the Lead Management

- All leads that are in the area of responsibility of the sales employee assigned to you are displayed in the Lead Management on your homepage (see Attachment 1).
- As soon as a new lead is received via the Q CELLS Solar Calculator, you will receive a message by email, allowing you to navigate directly to the lead in the Lead Management.

Step 2: Claim lead

- You can claim the leads received independently for yourself (see Attachment 2). It is now no longer visible to other fitters. You automatically reserve this lead with your claim for minimum two days.
- **ATTENTION:** If you do not process a claimed lead within these two days, it will automatically be released for the open lead market and become visible to other Q.PARTNER.
- Leads can also be assigned to you indirectly via the sales employee responsible for you. You will be notified by email if this occurs. If you do not process this lead within two working days you will be reminded of this lead once again by email.

Inquiries relating to you are displayed under “My Inquiries” in the Lead Management on the homepage and under the tab “New Inquiries” (see Attachment 1)

Step 3: Process lead

- You should process leads that are displayed under “My Inquiries” as soon as possible.
- You have the following options to document the status (see Attachment 3)
  - **Contact attempted:** You have contacted the potential customer in any way regarding their enquiry.
  - **Initial contact made:** You have contacted the potential customer and reached initial agreements.
  - **Offer sent:** You have sent an offer to the customer.
  - **Order placed:** An order has been placed by the enquiring customer.
  - **Not successful:** The enquiring customer has expressly rejected an order or further processing. They do not wish to be advised by another fitter either.
- **Reminder:** You would like to be reminded again about an enquiry at a certain time. Example: You have not contacted the potential customer so far and would like to contact him by phone in two days time.
- **Lead rejected:** You wish to reject a lead for any company-relevant reasons (no time for processing, no capacities for implementation etc.).
  
  - After updating the status, the lead is automatically moved from the “New Inquiries” tab to the tab corresponding to the status (see Attachment 1).
  
  - **NOTE:** Rejected leads are displayed to you with a green icon in the Lead Management. This serves to signal that you were already processing this lead (see Attachment 1).
“Available Inquiries” as display of the leads received via the Q CELLS Solar Calculator, which you can claim for yourself

A lead with:
- Lead data (ID, name & postcode of the potential customer)
- Date received
- Status display, e.g. “New” or “Lead claimed”
- If applicable, icon as a reminder that you were already processing this enquiry
- “Details” function, in which you can view further details of the lead

“My Inquiries” as display of the leads you have claimed

Views of the leads sorted by status (here: “Show all”)
Attachment 2: Enquiry Details View – Project Information

DETAILS

LEAD DETAILS  ID: 520

PROJECT INFORMATION

CONTACT INFORMATION
Name: Test3 GBLondon
Address: Abbey Road 3 NW8 London
Email: fellbaum@mellowmessage....
Phone: 32423
Availability: anytime

CONSUMPTION
People: 1
Yearly consumption: 2000 kWh
Average electricity price: 12 p / kWh
Consume: weekdays and weekend

ROOF INFORMATION
Roof size: 178.05 m²
Roof pitch: 30 °
Roof alignment: 179 °
Selected module: Q.PEAK DUO BLK-G5 und Q.PEAK DUO-G5
Number of modules: 6
Interested in storage solutions?: Yes

COSTS PER MONTH
With PV system: 12.00 €
Without PV system: 20.00 €
Savings: 18.00 €

COSTS PER YEAR
With PV system: 148.00 €
Without PV system: 240.00 €
Savings: 217.00 €

COSTS AFTER 20 YEARS
With PV system: 3990.00 €
Without PV system: 6449.00 €
Savings: 5384.00 €

LCA AFTER 20 YEARS
CO₂-Savings: 19837 kg
Trees: 260
Change processing status via dropdown menu