

Lead Management/CRM Optimization

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6. Analytical methods to optimize the process from acquiring prospects to converting them into customers

- Lead generation: The process of acquiring potential customers and measuring their effectiveness
- Lead nurturing: Analysis of the process of nurturing relationships with potential customers and increasing their desire to purchase
- Lead qualification: Evaluating the quality of potential customers and prioritizing them
- Marketing automation: Automating marketing activities and analyzing their effectiveness
- salesforce automation: Analysis for automating and streamlining sales activities
- CRM analysis: Analysis of understanding customers and strengthening relationships using data from customer relationship management systems
- Customer journey map: Organizing customer contact points in chronological order and analyzing to improve customer experience

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Lead generation

- Lead generation is the process of identifying potential customers and capturing their interest in your business.
- There are many different lead generation techniques, but the following example uses random data to generate virtual leads and generate code to show interest in them.
- Generate virtual data about leads and extract leads with high interest scores → Interest scores are generated randomly, in real projects, real data and marketing automation tools are used to evaluate customer behavior and interests
- Actual lead generation combines marketing strategies, digital advertising, SEO (search engine optimization), etc. → Specific methods and tools vary depending on business needs and industry

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Lead nurturing

- Lead nurturing is the process of providing appropriate information and content to potential customers to deepen their interest and increase their willingness to purchase.
- As a simple example, here is a code that shows the process of generating virtual leads using random data and nurturing them:
- Lead data has an interest score and an engagement score, and if the interest score is high, a white paper is sent and the engagement score is updated; if the engagement score reaches a certain level, the nurturing process proceeds by inviting the lead to a webinar.
- Actual nurturing is carried out based on the specific objectives and strategies of the business, and may combine multiple steps and content → Marketing automation tools are used to automate nurturing.

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4 Pillars to Proper Lead Nurturing

- 01 Consumer Psychology**
People are more alike than sometimes we'd like to believe. We use that likeness to optimize your funnel.
- 02 Thought Leadership Positioning**
Reinforcement of the idea you are the thought leader in your industry means leads will close faster and faster.
- 03 In-Depth Copywriting**
Copywriting principles follow scientific concepts which can be used to increase conversion rates.
- 04 Brand Storytelling**
Highlight the uniqueness of your brand by telling its story to your potential customers.



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An interest score and an engagement score

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THE ENGAGEMENT SCORE TAKES INTO ACCOUNT THE FOLLOWING ITEMS:

- ☒ NUMBER OF COMMENTS
- ☒ NUMBER OF LIKES
- ☒ NUMBER OF TIMES SHARED
- ☒ NUMBER OF CLICKS
- ☒ DOWNLOADS
- ☒ TIME SPENT ON THE PAGE.

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Lead qualification

- Lead qualification is the process of selecting the most valuable leads for your business from among your potential customers.
- As a simple example, here is a code that uses random data to generate hypothetical leads and shows the qualification process for them:

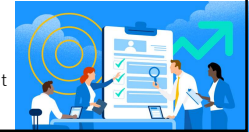
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Lead qualification

- Lead data has an interest score and an engagement score, and if both meet certain conditions, the lead is considered a qualified lead and handed over to sales.
- The actual lead qualification process varies depending on the business requirements and sales department policies: It is necessary to clarify the conditions and criteria for qualification and build a process to automatically judge based on them → This usually involves a combination of data analysis and machine learning methods.

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- Reps spend only 28% of their week actually selling, according to the State of Sales Report. What's more, 69% of sales professionals agree their jobs are harder now. And yet, they're under enormous pressure to hit their targets. That means sales teams need to hone in on the highest quality leads to make their numbers. That's where lead qualification comes into play. Let's talk about what it is and how to do it right.



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Marketing automation

- Marketing automation is a method to streamline marketing activities using automation tools and processes.
- Typical marketing automation tools provide functions such as email marketing, social media posting, website tracking, and lead management.
- Example of simple email marketing automation using Python: Caution is required from the perspective of security and privacy when using in a production environment.

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Marketing automation

- A simple example of sending an email from a specified sender address to a specified destination address using Gmail
- From a security standpoint, in actual projects, care must be taken when handling authentication information (SMTP server settings must also be changed to suit the project requirements)
- Python also has libraries for marketing automation → This depends on the specific tool and API, so it will vary depending on the tool used

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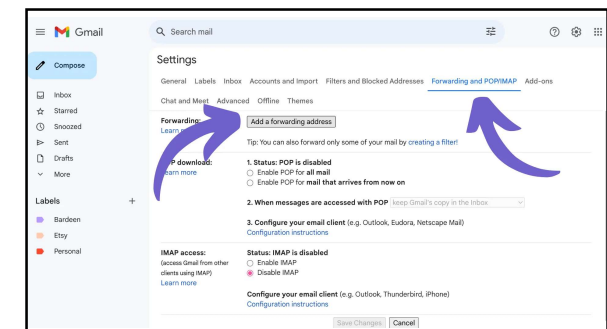


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Sending an email from a specified sender address to a specified destination address using Gmail

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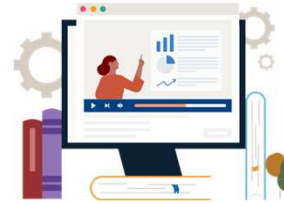
Sales forecasting

- Sales forecasting is done using various methods and models
- **Predict sales** using time series data: Uses a time series forecasting library called Prophet
- Convert time series data into a format suitable for Prophet, train the Prophet model and predict future sales
- Data preprocessing and model adjustment are required to suit the actual data and requirements
- There are various other methods for sales forecasting, and the appropriate method varies depending on the specific scenario → It is important to select a model according to the nature of the data and the forecast period

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Benefits of sales forecasting

- Avoiding cash flow problems
- Budgeting more efficiently
- Planning for more accurate staffing
- Aligning sales quotes with revenue expectations
- Estimating future revenue more accurately
- Focusing on high-revenue opportunities and eliminating sales failures



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salesforce Automation

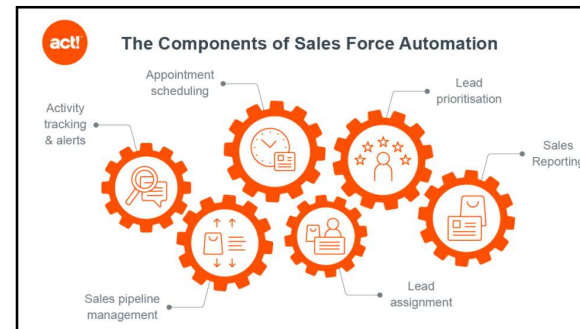
- salesforce Automation (SFA) is a solution for efficiently managing interactions with customers.
- It is mainly used as part of CRM (Customer Relationship Management) tools.
- When using proprietary tools such as salesforce, it is common to use APIs to retrieve and update data and perform actions.
- A simple example of creating data in salesforce from Python using salesforce's REST API (in practice, sufficient attention must be paid to salesforce authentication information and security)

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Salesforce's REST API

- Create a new account using Salesforce's REST API
- For actual use, you need to build an API request based on Salesforce's official documentation and API version
- Secure authentication methods and error handling are also important elements (we recommend that you refer to the Salesforce API reference to build an API request based on your specific business requirements)

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Customer Relation Management

- CRM is a process or tool for effectively managing customer information and strengthening customer relationships.
- Simple CRM code example with CRUD (Create, Read, Update, Delete) operations
- When using it in real business, data security and access control must be considered.
- Simple CRM example in Python using SQLite: SQLite is a lightweight, embeddable database engine

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Benefits of Customer Relationship Management



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Customer table using SQLite

- A SimpleCRM class is implemented that creates a simple **customer table using SQLite** and provides basic CRUD operations.
- Databases, table structures, data security, etc. must be designed to suit the actual business.

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Customer journey map

- A customer journey map is a visual representation of the process a customer goes through using a product or service, helping you understand the customer experience for marketing and service improvement purposes.
- To create a customer journey map in Python, use a visualization library such as matplotlib or seaborn.
- Simple customer journey map example

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Customer journey map

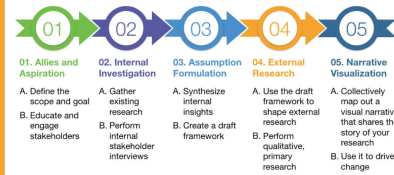
- Define stages such as consideration, purchase, use, and support, and the touch points for each stage, and visualize them as a scatter plot: A customer journey map visually represents customer actions and touch points at each stage.
- In actual projects, more advanced data processing and visualization are required to create dynamic customer journey maps based on data.
- The approach varies depending on the specific library, data format, and data set.

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The 5 Steps of Successful Customer Journey Mapping

nngroup.com

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Consideration, purchase, use, and support

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