

Commercial Marketplace Lead Management

Stay on top of your best leads by connecting your Microsoft AppSource or Azure Marketplace listing to your CRM.



Lead management at a glance

- ❖ **Ensure** you don't miss out on business opportunities.
- ❖ **Understand** who reached you and reach out to them.
- ❖ **Integrate** your CRM to manage your leads in one central location.



Best practices for lead management

Process

Define a clear sales process, with milestones, KPIs, and clear team ownership

Qualification

Define prerequisites which indicate whether a lead has been fully qualified. Ensure sales or marketing representatives qualify leads carefully before taking them through the full sales process

Follow ups

Don't forget to follow up – expect the typical transaction to require 5 to 12 follow up calls

Nurture

Nurture your leads; this could get you on the way to a higher profit margin

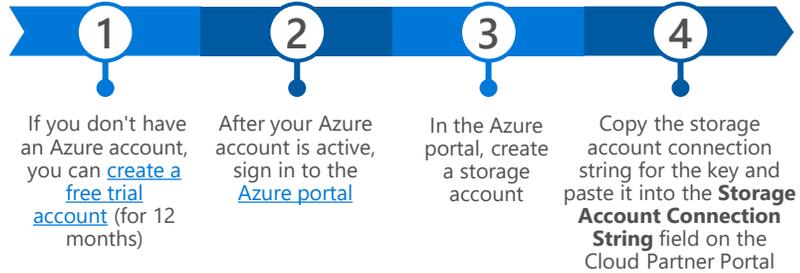


Things to know while you integrate your CRM

- ❖ **CRM compatibility.** The following systems are supported: Microsoft Dynamics 365, Marketo, Salesforce as well as Azure Table and HTTPS endpoint.
- ❖ **Read the documentation.** To see how to set up a lead destination, read the documentation [here](#), or check out the FAQ [here](#).
- ❖ **Configure a lead destination.** When you create a new offer in Partner Center you can go to "Offer setup", "Customer leads" section and click "Connect" to set up.
- ❖ **Validate lead configuration:** In the "Connection details" you can click "Validate" to send a test lead to the lead destination configured. See an example [here](#).
- ❖ **Need support?** Contact Support [here](#). Select Category = "Commercial Marketplace", select Topic = Lead management configuration.
- ❖ **Can't find the lead in your CRM?** The end user's email domain may originate from .edu. Microsoft won't pass PII data from .edu domains.
- ❖ **Can't find the lead in Salesforce?** Read [this article](#). Check if the web to lead form is a mandatory field based on a picklist. If so, change it to a non-mandatory text field.

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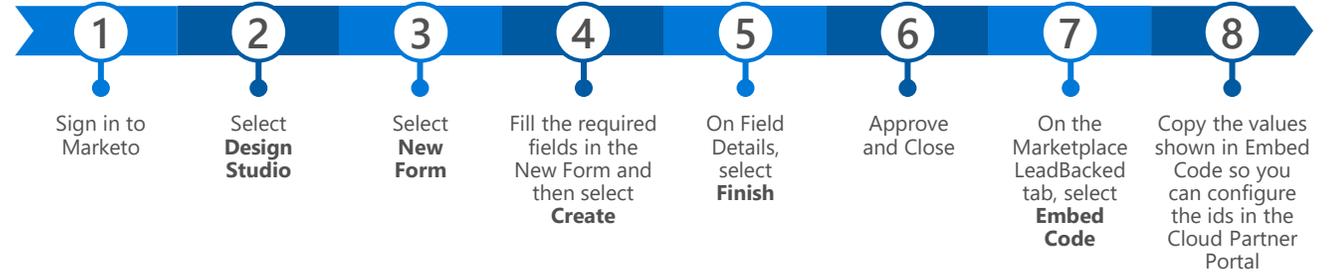
Setting up leads in [Azure Table](#)



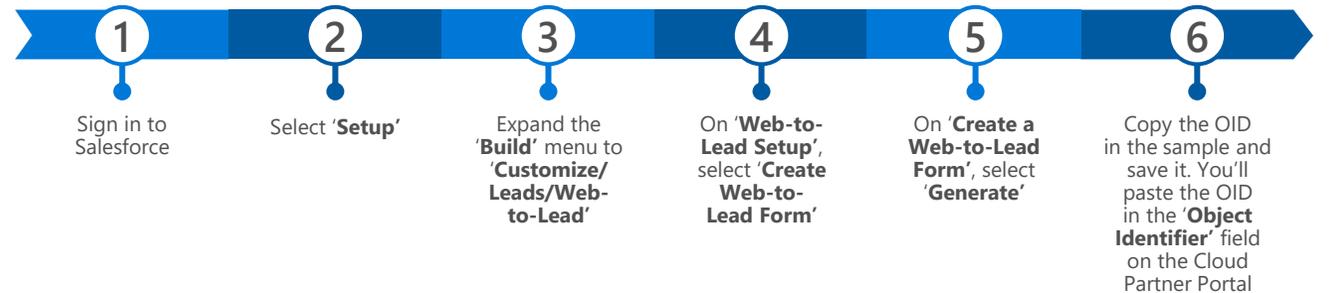
Setting up leads in [Microsoft Dynamics 365](#)



Setting up leads in [Marketo](#)



Setting up leads in [Salesforce](#)



Setting up leads using an [HTTPS endpoint](#)

