Lead Sharing User Guide

Introduction

The Johnson Controls Lead Sharing program is a web-based system for all customer-facing Johnson Controls[1] personnel to share sales leads. Specifically, it is intended to enable legacy Tyco personnel to pass a lead to legacy Johnson Controls personnel and legacy Johnson Controls personnel to pass a lead to legacy Tyco personnel.

Table of Contents

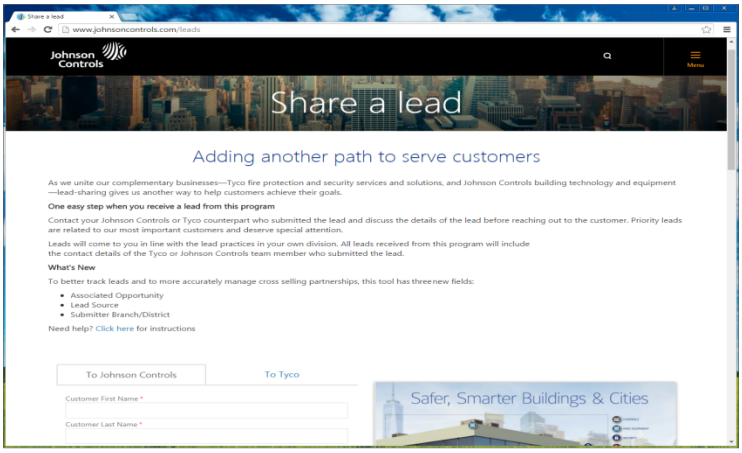
[1] Johnson Controls refers to the new combined enterprise as of September 6, 2016. “Legacy Tyco” and “Legacy JCI” refer to the personnel of the pre-merger companies of Tyco and JCI.

Getting Started

The Lead Sharing system is available at www.johnsoncontrols.com/leads. Bookmark this site in your Chrome browser and on your smartphones and handheld devices.

The web page does not require a log in or password.

Note: *This is an internal tool. Do not share the URL outside of Johnson Controls International.*



Choose a Path

At the top of the form section you'll see two tabs.

If….	*Then….*
You are a legacy Tyco sales or service person entering a lead for Johnson Controls,	Select **To Johnson Controls**.
You are a legacy Johnson Controls sales or service person entering a lead for Tyco,	Select **To Tyco**.

Note *The forms are slightly different for each. It's important you make the right selection as you start your entry to ensure you capture all necessary to generate the lead.*

Enter a Lead to Johnson Controls

Enter as much information as possible about your lead to ensure it's managed and tracked appropriately. Fields marked with an asterisk (*) are required.

Note: *You cannot submit a lead without completing the required fields.*

Enter Customer Information

1. Enter information for the individual at the customer company who will be the contact for this lead.
   a. Customer First Name
   b. Customer Last Name
   c. Customer Email
2. Enter information about the company where you've identified the lead.
   a. Customer Company
   b. Customer Type – this specifies the type of customer for the lead share you're submitting. Select from the following options.

If….	*Select….*
The customer is the contractor of the building under construction,	**Contractor**
The customer is the designer of the building,	**Designer**
The customer is the owner of the building,	**Owner**

   c. Customer Country - Select the country where the product or service opportunity is located. In some cases, the main address may be different (mailing address, a home office, etc.). For "Country" always select the country where the selling opportunity will be managed.

If….	*Then….*
You choose **United States**,	A State field will be enabled after the City field and is required.
You choose **Canada**,	A Territory field will be enabled after the City field and is required.

   d. Customer Phone – Enter the phone number to reach contact person named above.
   e. Address, City and Zip – Enter an optional physical address, preferably the location of the customer named above.

Enter the Johnson Controls Lead Information

1. Select the Lead Source.

If….	*Then….*
You are submitting a lead for a Major Project, and this lead can be pursued as a sub-contract,	Select **Sub-contract**.
You are submitting a lead to be pursued independently by Johnson Controls,	Select **Lead Pass**.
You are submitting a lead for selling together as a team to the customer,	Select **Co-sell**.
You are entering a lead for a booked project that can be converted to a Johnson Controls product,	Select **Backlog**.

2. Enter the opportunity number (if known) or opportunity name of the source contract in the **Associated Opportunity** field.

   Note: *This field can be used in two scenarios:*

   - This new lead can be pursued as a sub-contract, and linked to the source opportunity for Major Projects that have an open opportunity.
   - This field can be used to enter the lead information and link it to the source opportunity for existing opportunities where the lead share form wasn't used for a cross-sell.
3. Select the Lead Type.
4. Enter a brief description of the lead or any supporting Comments. These notes, together with the Lead Type, help determine the best assignment of this lead within Johnson Controls.
5. If this account is designated by your sales leadership as a Strategic / Key Account, check the **Yes** box. This will trigger special handling, routing to sales management and special tracking.
6. If this account is designated by your sales leadership as a CBRE Account, check the **Yes** box. This will trigger special handling, routing to sales management and special tracking.

Enter Your Information

Enter as much information as possible into this section so your colleague can contact you to discuss this lead.

1. Your Name.
2. Your Email address. It is important to enter your valid email address where the lead recipient can contact you.
3. Your Phone Number.
4. Job Title.
5. Enter your branch or district. This field identifies your Branch/District as the lead submitter, and is used for reporting purposes.

   Note: *The Branch names have the name of the organization prefixed to them to avoid duplicates. (For example: JCI Detroit, MI, Branch # 0N16 = JCI-Detroit, MI)*

Submit Your Lead

Click **Submit Your Lead**. If you've missed required fields, you'll get feedback on what you need to complete before you submit again. Once all fields are complete, your lead is entered into the system.

Enter a Lead to Tyco

Enter as much information as possible about your lead to ensure it's managed and tracked appropriately. Fields marked with an asterisk (*) are required.

Note: *You cannot submit a lead without completing the required fields.*

Enter Customer Information

1. Enter information for the individual at the customer who will be the contact for this lead.
   a. Salutation.
   b. Customer First Name
   c. Customer Last Name
   d. Customer Email
   e. Customer's Job Title.
2. Enter information about the company where you've identified the lead.
   a. Customer Company
   b. Customer Country - Select the country where the product or service opportunity is located. In some cases, the main address may be different (mailing address, a home office, etc.). For "Country" always select the country where the selling opportunity will be managed.

If….	*Then….*
You choose **United States**,	A State field will be enabled after the City field and is required.
You choose **Canada**,	A Territory field will be enabled after the City field and is required.

   c. Customer Phone – Enter the phone number to reach the contact person named above.
   d. Address, City and Zip – Enter an optional physical address, preferably the location of the customer named above.
   e. Customer Type – This specifies the type of customer for the lead share you're submitting. Select from the following options.

If….	*Select….*
The customer is a consultant for the building under construction,	**Consultant**
The customer is the contractor of the building under construction,	**Contractor**
The customer is a distributor or dealer for parts/equipment for the building under construction,	**Dealer or Distributor**
The customer is the end user or owner of the building,	**End User**
If the customer is the architect or engineer of the building,	**Architect or Engineer**

Enter the Tyco Lead Information

1. Select the appropriate Primary Solution – Product/Installation.

   Note: *The choices in the drop-down are based on what you selected as the Customer Type (above).*

2. Select the Lead Source.

If….	*Then….*
You are submitting a lead for a Major Project, and this lead can be pursued as a sub-contract,	Select **Sub-contract**.
You are submitting a lead to be pursued independently by Johnson Controls,	Select **Lead Pass**.
You are submitting a lead for selling together as a team to the customer,	Select **Co-sell**.
You are entering a lead for a booked project that can be converted to a Tyco product,	Select **Backlog**.

3. Enter the opportunity number (if known) or opportunity name of the source contract in the **Associated Opportunity** field.

   Note: *This field can be used in two scenarios:*

   - This new lead can be pursued as a sub-contract, and linked to the source opportunity for Major Projects that have an open opportunity.
   - This field can be used to enter the lead information and link it to the source opportunity for existing opportunities where the lead share form wasn't used for a cross-sell.

4. Select the Industry for this customer from the standard classifications in the drop-down list.
5. Use the Timeline field to enter a date for the timing of this opportunity.
6. Use the Description field to describe the lead. This will help define the solution and ensure it is routed to the most appropriate Tyco specialists to pursue the lead.
7. If this account is designated by your sales leadership as a Key Account / Strategic Priority, check the **Yes** box. This will trigger special handling, routing to sales management and special tracking.

Enter Your Information

Enter as much information as possible into this section so your colleague can contact you to discuss this lead.

1. Your Name.
2. Your Email address. It is important to enter your valid email address where the lead recipient can contact you.
3. Your Phone Number.
4. Enter your branch or district. This field identifies your Branch/District as the lead submitter, and is used for reporting purposes.

   Note: *The Branch names have the name of the organization prefixed to them to avoid duplicates. (For example: SG Chicago, IL, Branch # 311 = SG-Chicago; E3 Addison, IL = E3-Addison, IL)*

Submit Your Lead

Click **Submit Your Lead**. If you've missed required fields, you'll get feedback on what you need to complete before you submit again. Once all fields are complete, your lead is entered into the system.

Next Steps

Set Customer Expectations

This process – our combined company and lead sharing – is new for all of us. Naturally, our instinct is to serve the customers' requirements quickly and create new selling and servicing opportunities. These leads will be acted upon daily and routed as efficiently as possible. But given the size, scale and depth of the combined company, routing these leads to the best person/team to respond is a complex undertaking. Please set the customer expectations appropriately, such that – depending on the nature of the lead – it may take up to a few days to get back to the customer. The lead recipient will contact you first to discuss the response and follow up.

Expect a Contact from the Lead Recipient

Be sure to provide as much contact information as you can and expect a contact from the lead recipient. This is a great opportunity not just to serve this customer, but to forge relationships in the new Johnson Controls International and expand selling opportunities.