



Optimizing Customer Classification for Fortech International

Double Degree work

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## Resumen

Este informe presenta una investigación exhaustiva para abordar los objetivos asignados por Fortech International. Los objetivos principales incluyeron identificar datos adicionales relevantes para la calificación de leads, determinar el proceso óptimo para obtener estos datos y establecer métodos sólidos de verificación de calidad. Nuestro enfoque involucró una revisión detallada de varias herramientas de inteligencia artificial y técnicas de scraping web para automatizar eficazmente estos procesos.

La investigación abarcó múltiples aspectos de la adquisición de datos, asegurando la precisión y confiabilidad de los mismos mediante métodos de verificación meticulosos. Desarrollamos un flujo detallado de datos para los procesos de calificación y verificación, y evaluamos diversas herramientas disponibles para estas tareas. Además, nos centramos en la automatización de estos procesos para mejorar la eficiencia.

Basándonos en nuestros hallazgos, proporcionamos recomendaciones prácticas para que Fortech las implemente. Estas recomendaciones tienen como objetivo optimizar el proceso de calificación de leads, mejorar la calidad de los datos e integrar la automatización en su flujo de trabajo de manera efectiva. Al adoptar estas recomendaciones, Fortech puede lograr un sistema más eficiente y confiable para la calificación y verificación de leads, asegurando que sus procesos empresariales se mantengan actualizados con la información y altamente innovadores.

**Palabras Claves:** Clasificación, Fortech International, calificación de leads, adquisición de datos, verificación de calidad, herramientas de inteligencia artificial, scraping web,

automatización, precisión de datos, confiabilidad de datos, optimización de procesos, mejora de eficiencia, integración de flujo de trabajo, procesos empresariales, innovación, cliente.

## Abstract

This report presents a comprehensive investigation to address the objectives assigned by Fortech International. The primary goals included identifying relevant additional data for lead qualification, determining the optimal process for obtaining this data, and establishing robust quality verification methods. Our approach involved an in-depth review of various AI tools and web scraping techniques to automate these processes effectively.

The research covered multiple aspects of data acquisition, ensuring data accuracy and reliability through meticulous verification methods. We developed a detailed flow of data for the qualification and verification processes and evaluated various tools available for these tasks. Additionally, we focused on the automation of these processes to enhance efficiency.

Based on our findings, we provided practical recommendations for Fortech to implement. These recommendations aim to streamline the lead qualification process, improve data quality, and integrate automation into their workflow effectively. By adopting these recommendations, Fortech can achieve a more efficient and reliable system for lead qualification and verification, ensuring that their business processes remain up to date with the information and highly innovative.

**Key Words:** Classification, Fortech International, lead qualification, data acquisition, quality verification, AI tools, web scraping, automation, data accuracy, data reliability, process optimization, efficiency improvement, workflow integration, business processes, innovation, customer.

## **1. Introduction**

Fortech International GmbH is an Austrian company that specializes in energy solutions, particularly in the fields of welding technology, photovoltaics, and battery charging technology. They develop and manufacture innovative products and solutions for various industries, aiming to provide efficient and sustainable energy solutions. Fortech is known for its high-quality welding equipment, inverters for solar energy systems, and battery charging systems used in a wide range of applications.

### **1.1. Problem definition**

During the process of lead qualification, Fortech encountered various challenges that need addressing. These issues primarily revolve around incomplete data sets, particularly concerning installers, totalling approximately 49,000 leads with missing details like phone numbers and addresses. To rectify this, efforts involve internet searches or direct contact via phone with the assistance of an agency to retrieve the necessary information. Additionally, there's uncertainty regarding the competitiveness of these leads, as it's unclear how many other inverters they've installed within the year. Furthermore, following up with existing leads poses a manual and time-consuming task, involving sending emails, invitations for fairs, and communication efforts, particularly prioritizing engagement with significant market players.

## 1.2. Goals

In order to maximize results for Fortech, it's essential to address several key objectives. Firstly, we need to pinpoint pertinent supplementary data for lead qualification. Secondly, we must determine the most effective process for acquiring this data. Lastly, we need to establish methods for verifying the quality of the obtained information. These steps are crucial for setting up automation and minimizing manual intervention, enabling us to concentrate on identifying and engaging with the most promising customers at the earliest opportunity.

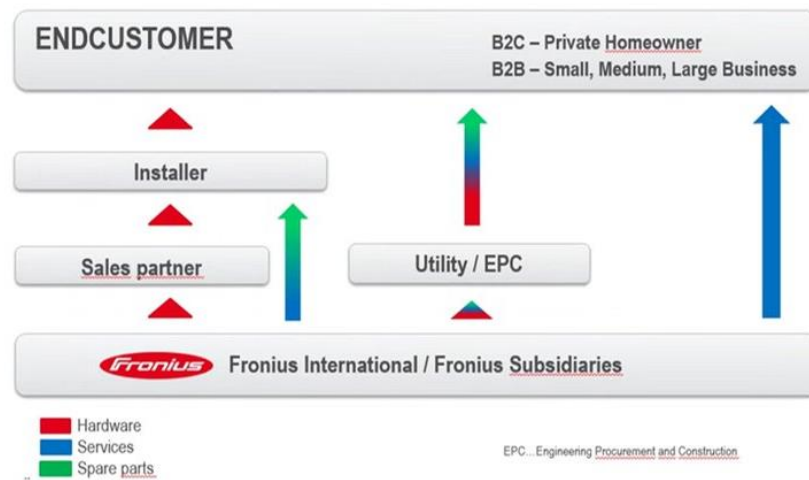
## 2. Practical Aspects

### 2.1. Sales Channel - an Overview

As Fortech is a premium solution provider for PV systems and e-mobility, it enables customers to produce their own energy for consumption. Fortech produces the inverter for the photovoltaic systems, and therefore the sales channel looks like the following:

**Figure 1**

*Sales Channel of an inverter by Fortech*



Source: Fronius (2024)

Thus, Fortech is required to talk to not only the sales partner, but also the installer who functions as some sort of connection to the technician and the electrical engineering.

Fortech glances with its professional instruction and a regular training for its partners and provide excellent service when it comes to solar energy.

## **2.2. Current Lead Search**

For now, Fortech uses various channels to search for their leads. Generally, a lead is a person who is interested in the product or service provided. Generating leads is required for companies, in order to transform them in a qualified fit for their company. Right now, Fortech generates its leads with the following measures and actions:

- Trade fairs
- Webinars
- Trainings
- Landing page
- Product registration
- Roadshows
- Newsletter registration

### **2.3.Current Qualification Process**

If the lead registers throughout the measures Fortech takes, it appears in their Customer Relationship Management (CRM) System. It is important to check if the newly registered lead is a duplicate or not and if the allocation of the lead is correct (person/country) in order to avoid mistakes. Furthermore, it is fundamental that the mandatory fields are completed and to add eventual missing information which needs to be added by research. If the data is either complete or incomplete, the lead gets qualified or disqualified.

The qualification of a lead is vital as the record automatically appears in the installer's search and Fortech can learn from the obtained data for future measures in order to act according to the ongoing market situation. Gathering data helps to adjust newsletters, training innovation as well as information, moreover the registered serial numbers can be properly linked to the installers account. The more data available, the better the quality in the CRM system.

## **Main Content**

### **3. Lead qualification**

The first process is the product registration in which the installer is either already qualified or has to register. If he wants to register, he has to fill in his name, country, serial number of the product and optionally an email or phone number. After the registration the company has to qualify the lead. Therefore, first the company has to check if the installer is a duplicate or is not registered in the system yet. If the lead is a duplicate, the existing and the new lead are merged together, and the missing information will be added. If the lead is incomplete, the missing data has to be found out by research (external agencies).

Finding out the additional information is time consuming and therefore, cost intensive. In order to improve this process, various AI tools for customer lead identification can be implemented. All the data is relevant for the period of the project: March-June.

#### **3.1. Drift**

Drift's platform is built on chatbot technology, which understands and responds to user requests using natural language processing (NLP) and machine learning. These chatbots may be programmed to give tailored help, qualify leads, organize meetings, and even handle transactions directly from the chat interface (Drift.com, 2024).

One of Drift's most notable features is its ability to detect and prioritize high-intent website visitors based on a variety of parameters, including pages seen, time spent on site, referral source, and others. Drift's real-time data analysis enables organizations to proactively interact with the most promising prospects, raising conversion rates and shortening the sales cycle (Drift.com, 2024).

In addition to lead generation, Drift provides customer support and engagement tools such as live chat, email management, and knowledge base integration. This omnichannel approach allows businesses to create seamless and tailored experiences across several touchpoints, resulting in increased customer satisfaction and loyalty (Drift.com, 2024).

### **Pricing:**

Drift offers different packages that are tailored to the customer's needs (Drift.com, 2024):

**Table 1***Drift suscriptions plans*

<b>Premium</b>	<b>Advanced</b>	<b>Enterprise</b>
Starting at \$2 500/ month (billed annually)	Custom price	Custom price
Key features:	Key features:	Key features:
<ul style="list-style-type: none"> <li>- Live chat</li> <li>- Meetings</li> <li>- Custom chatbots</li> <li>- Intel</li> <li>- Real-time notifications</li> <li>- Conversational landing pages</li> </ul>	<ul style="list-style-type: none"> <li>- Fastlane</li> <li>- Audiences</li> <li>- A/B testing</li> <li>- Flex routing</li> </ul>	<ul style="list-style-type: none"> <li>- Workspaces</li> <li>- AI-powered chatbots</li> <li>- Custom RBAC</li> </ul>

Source: Own Elaboration(2024)

### 3.2. Clearbit

Clearbit's major offering is its data enrichment service, which allows organizations to supplement their existing customer data with extra information gathered from a variety of public and proprietary sources. This contains information such as business size, industry, revenue, location, technographics, and firmographics. Clearbit uses machine learning methods and data aggregation techniques to ensure that the enriched data is accurate, dependable, and up to date (Clearbit, 2024).

Furthermore, Clearbit provides lead generation and prospecting tools, allowing organizations to locate and rank new consumers based on preset criteria. Clearbit's AI algorithms

create prediction ratings for leads based on characteristics such as website activity, job titles, and corporate qualities (Clearbit, 2024).

### **Pricing:**

The Clearbit for Business Plan is based on volumes and can be customized to include add-on capabilities (Clearbit, 2024).

### **3.3. Conversica**

Conversica's platform uses AI-powered virtual sales assistants to engage leads and prospects in human-like conversations. These assistants initiate contact via email, chat, or SMS, and handle discussions to qualify leads, arrange meetings, and follow up on queries. Conversica's AI analyzes responses to identify and prioritize promising leads, directing them to sales professionals for further interaction. By automating repetitive tasks, Conversica enables sales teams to focus on high-value activities and increase conversion rates (Conversica Inc., 2024).

### **Pricing:**

Conversica's pricing strategy is also need based. Their subscription pricing is starting at \$2999/ month based on functionality needs (GetApp, 2024).

### **3.1. Identifying Target Accounts**

#### ***3.1.1. Ocean.io***

Ocean.io is a B2B data platform that provides comprehensive insights into companies and their decision makers. It offers a range of features and tools that can for example be used to identify and generate leads. By using filters, the tools can help a company to target specific industries, company sizes, locations and other vital aspects. In addition, it can help identifying prospects by creating a prospect list tailored to your ideal customer profile (Ocean.io, 2024).

#### **Pricing:**

Ocean.io starts its pricing at 250€ per month. The company tailors their prices to specific categories such as: numbers of regions, numbers of seats a company needs and number of export credits the customer will use. Furthermore, Ocean.io offers a free trial period of 72 hours. In addition, the company offers a 10% discount for all up-front annual payments (Ocean.io, 2024).

### ***3.1.2. Google alerts***

Google alerts tool monitors the Internet for specific topics and/or keywords. If the search engine stumbles over these specifications, you will get a notification via email. Those alerts can be uniquely designed by the customer and are based on keywords, phrases, topics or specific search queries. In addition, you can specify the source, this means whether the information is sourced from a blog, article, etc. Moreover, the companies can choose how often they want to receive those alerts. Users can decide independently if they want alerts and in what time span (daily, weekly, etc.) (Google, 2024).

### **Pricing:**

Google alerts can be used for free without any hidden costs. (Mention, 2024)

### ***3.1.3. Leadfeeder***

This AI tool helps companies identify and qualify leads from web traffic. The advantage of Leadfeeder is that it also tracks and identifies those people that have not filled out any forms or clicked on any buttons by cross-referencing their IP-addresses with publicly available data. It provides detailed data on the identified leads and the associated companies (Leadfeeder, 2024).

#### **Pricing:**

Leadfeeder offers monthly and annual plans with different subpackages.

Benefits and pricing of the annual plans (Leadfeeder, 2024):

**Table 2***Leadfeeder benefits and pricing of annual plans*

<b>Free</b>	<b>Paid</b>
\$0/month	\$99/month
Plan includes: <ul style="list-style-type: none"> <li>- Identified companies</li> <li>- Visitor data storage</li> </ul> Visitor data storage: last 7 days Identified companies: max. 100, Unlimited № of users	Everything in Free, plus: <ul style="list-style-type: none"> <li>- Verified and revealed company details</li> <li>- Track behaviour &amp; page visits, User management</li> <li>- Automatic deal creation &amp; updates; Marketing integrations</li> <li>- Custom feeds and filters; Video &amp; download tracking</li> <li>- Automatic notifications and Monitor target accounts</li> </ul> Identified companies: unlimited Visitor data storage: unlimited Emails/Phone numbers: 25 credits/month

Source: Own Elaboration(2024)

Benefits and pricing of the monthly plans (Leadfeeder, 2024):

**Table 3***Leadfeeder benefits and pricing of monthly plans*

<b>Free</b>	<b>Paid</b>
\$0/month	\$165/month
Same features as in annual plan.	Same features as in annual plan.

Source: Own Elaboration(2024)

Leadfeeder offers a 14-day free trial period. After the trial period Leadfeeder will automatically change the package to the Free option (Leadfeeder, 2024).

## **3.2. Identify Contact Person**

### ***3.2.1. LinkedIn Sales Navigator***

LinkedIn Sales Navigator is an AI tool provided by LinkedIn. Designed specifically for sales professionals, marketers, and business development representatives, it offers a range of features and functionality to help users identify, target, and engage with prospects more effectively on the LinkedIn platform. By analyzing users' saved leads, preferences, and previous interactions, the platform offers customized lead suggestions. This valuable feature assists users in uncovering potential prospects that align well with their offerings (Callahan, 2024).

**Pricing:**

LinkedIn Sales Navigator offers their services for 79.33€ per month. Firstly, you can still try out the free trial (1 month). They state that their provided data is people-powered and due to the high amount of LinkedIn members, it is the world's largest source of professional data. It enables sellers to select the right buyers due to the scalability of the provided insights provided (LinkedIn, 2024).

**3.2.2. *Lusha.com***

Lusha.com, a software company specializing in lead enrichment and contact information accuracy, offers a range of solutions to assist businesses in locating contact details for potential leads and prospects. Their tools not only verify contact information but also enhance existing CRM data, providing comprehensive support for businesses (Lusha, 2024).

**Pricing:**

Lusha.com offers several different pricing options which you either pay annually or monthly. The pricing is dependent on the number of users. The different packages include different limitations according to the price range (Lusha, 2024).

Benefits and pricing for annual plan (Lusha, 2024):

**Table 4***Lusha benefits and pricing for annual plans*

<b>Free</b>	<b>Pro</b>	<b>Premium</b>	<b>Scale</b>
\$0 test drive it	\$36/month	\$59/month	Let's talk
Free includes: - Direct phone numbers - Landline phone numbers - Email addresses - Basic prospecting platforms - Basic Chrome extension - Email sequencing  Credits/month: Emails 50 / Phones 5 1 user	Everything in Free, plus: - List management - List export - Basic sales team management - Shared credit pool  Credits/month: Emails: Unlimited / Phones: 480 1 user	Key features in Pro, plus: - Prospecting bulk show (25 contacts) - Extension bulk show (25 contacts) - Basic usage analytics  Credits/month: Emails: Unlimited / Phone 960 1 user	Everything in premium, plus: - CSV enrichment - Prospecting bulk show (1000 contacts) - CRM integrations - SSO - Advanced team management - customer success manager - intent signals - job changes - technologies - CRM enrichment - Lusha API  Credits/month: Unlimited contacts

Source: Own Elaboration(2024)

Benefits and Pricing for the monthly plans (Lusha, 2024):

**Table 5***Lusha benefits and pricing for monthly plans*

<b>Free</b>	<b>Pro</b>	<b>Premium</b>	<b>Scale</b>
\$0	\$49/month	\$79/month	Let's talk
test drive it			
Free includes:	Everything in	Key features in Pro,	Everything in
- Direct phone numbers	Free, plus:	plus:	premium, plus:
- Landline phone numbers	- List management	- Prospecting bulk show (25 contacts)	- CSV enrichment
- Email addresses	- List export	- Extension bulk show (25 contacts)	- Prospecting bulk show (1000 contacts)
- Basic prospecting platforms	- Basic management	- Basic usage analytics	- CRM integrations
- Basic Chrome extension	- Shared credit pool		- SSO
			- Advanced team management
			- customer success manager
			- intent signals
			- job changes
			- technologies
			- CRM enrichment
			- Lu
			sha API
Credits/month: 5	Credits/month: Unlimited /	Credits/month: 80	Credits/month: Unlimited contacts
Emails 50 / Phones 1 user	Emails: Unlimited / Phones: 40	Emails: Unlimited / Phone: 80	
	1 user	1 user	

Source: Own Elaboration(2024)

### **3.2.3. *Acquisio***

Acquisio is widely utilized by digital agencies, brand marketers, and local SEM resellers to help them achieve significant outcomes in search, social and display advertising with AI. Acquisio, headquartered in Montreal, a worldwide known powerhouse for artificial intelligence, provides software that allows marketers to run large-scale advertising campaigns (Acquisio, 2019).

#### **Pricing:**

This company is tailoring their pricing structure based on the customer's needs. Factors considered are the level of service, the amount of ad spend to manage and the volume of accounts that the customer needs (Acquisio, 2019).

However, a company can use the following approximate guide (GetApp, 2024):

**Table 6***Acquisio subscription plans*

<b>Starter</b>	<b>Standard</b>	<b>Premium</b>
\$199/month	\$899/month	\$1899/month

Source: Own Elaboration(2024)

**3.2.4. Datanyze**

Datanyze is a sales intelligence tool that uses artificial intelligence and data analytics to help organizations find and target their ideal clients more efficiently. It offers insights into a company's technological stack, allowing sales and marketing teams to prioritize prospects, tailor approach, and increase conversion rates (Datanyze, 2024).

One of Datanyze's most notable features is its web crawling engine, which continually analyzes millions of websites to acquire information about the technologies they employ. This data comprises information about the software, tools, and platforms used by businesses, such as CRM systems, marketing automation software, content management systems, and so on.

Datanyze then uses this data to produce actionable insights for its consumers (Datanyze, 2024).

Datanyze uses machine learning algorithms to forecast purchase signals and identify potential prospects who are likely to be looking for certain items or services. This allows sales teams to focus their efforts on high-potential prospects, which increases their chances of closing agreements (Datanyze, 2024).

## Pricing:

Datanyze provides two different pricing strategies. They offer a monthly and a yearly package (Datanyze, 2024).

Different packages of an annual plan (Datanyze, 2024):

**Table 7**

### *Datanyze annual suscription plans*

<b>Nyze Lite</b>	<b>Nyze Pro1</b>	<b>Nyze Pro 2</b>
\$0	\$21 / month when billed yearly	\$39 / month when billed yearly
- 90-day free trial - 10 credits per month	- 960 credits per year	- 1920 credits per year

Source: Own Elaboration(2024)

Different packages in a monthly plan (Datanyze, 2024):

**Table 8***Datanyze monthly suscription plans*

<b>Nyze Lite</b>	<b>Nyze Pro1</b>	<b>Nyze Pro 2</b>
\$0	\$29 / month when billed yearly	\$55/ month when billed yearly
- 90-day free trial - 10 credits per month	- 80 credits per month	- 160 credits per month

Source: Own Elaboration(2024)

### 3.3. Personalization

#### 3.3.1. RichRelevance

RichRelevance employs machine learning algorithms to evaluate massive volumes of customer data, such as browsing activity, purchase history, demographics, and contextual information, in order to provide real-time product suggestions. These recommendations are personalized to each user's specific interests and intent, boosting the chance of engagement and conversion (RichRelevance, 2022).

One of RichRelevance's primary characteristics is its ability to enable omnichannel customization, which means it can give consistent and seamless buying experiences across a

variety of touchpoints like as websites, mobile applications, email, and in-store encounters. This seamless connection enables companies to provide a consistent consumer experience and strengthen ties with their target audience (RichRelevance, 2022).

In addition to its core customization platform, RichRelevance provides data management, analytics, and A/B testing solutions, allowing merchants to enhance their personalization tactics and quantify the impact on key performance indicators. This data-driven strategy allows firms to constantly adjust and improve client experiences over time (RichRelevance, 2022).

### **Pricing:**

The pricing information is not provided on the company and has therefore to be requested if interested in their products and services (RichRelevance, 2022).

### **3.3.2. Acquia**

Acquia offers a cloud-based platform that allows organizations to build, manage, and improve their digital experiences, such as websites, apps, and other content-driven efforts. The platform is built on open-source technologies such as Drupal, a popular content management

system (CMS), as well as Acquia-developed proprietary products and services (Acquia Inc., 2024).

Acquia incorporates AI into its personalization capabilities. Acquia's technology analyzes user behavior, preferences, and other contextual data to offer customized content and suggestions to each unique visitor, increasing engagement and boosting conversions. These AI-driven customization capabilities enable organizations to provide more relevant and appealing experiences to their target audience, eventually increasing customer happiness and loyalty (Acquia Inc., 2024).

### **Pricing:**

Acquia offers a 30-day free trial period. Acquia Cloud Professional, which starts at \$141 per month. For pricing information on the other packages such as Acquia Cloud Standard, Plus, Premium & Elite, the company itself needs to get contacted (GetApp, 2024).

### **3.3.3. Emarsys**

With the Emarsys consumer engagement platform, companies and marketers from many sectors can tailor cross-channel consumer engagement and achieve better business results. The

clients demand relevant, individualized experiences whenever they connect with the business. To do this, you will need a client interaction platform that is tailored to the unique needs of your sector. Emarsys combines sales, product, and customer data to provide actionable insights in a single source. This increases marketers' capacity to act, which positively impacts their company results (Emarsys, 2024).

### **Pricing:**

To get insight into Emarsys pricing the company itself needs to be contacted (Emarsys, 2024).

## **3.4. Segmentation**

### ***3.4.1. MadKudu***

MadKudu is an AI solution that enables enterprises to use predictive analytics for lead scoring and customer segmentation. MadKudu's machine learning algorithms provide prediction

ratings for leads based on a variety of data sources, including website activity, firmographics, and past contacts (MadKudu Inc., 2024).

The solution interfaces with major marketing automation systems like as HubSpot, Marketo, and Salesforce, allowing users to automate lead qualifying and prioritize sales efforts using predictive ratings. This connection streamlines the lead management process, allowing sales and marketing teams to focus their efforts on prospects with the best conversion potential (MadKudu Inc., 2024).

MadKudu's AI models are always learning from fresh data and feedback, adjusting their predictions over time to increase accuracy and efficacy. This iterative method guarantees that firms can respond to changing market dynamics and customer behaviors, resulting in better outcomes and higher ROI (MadKudu Inc., 2024).

### **Pricing:**

MadKudu has three different pricing strategies. Each package has different features and benefits (G2, 2024).

**Table 9***Madkudu pricing and features*

<b>Pro</b>	<b>Growth</b>	<b>Enterprise</b>
\$2, 499.00	\$ 1,999.00	Contact Us
- All growth features	- Real-time Lead Scoring & Enrichment	- All Pro Features
- Smart retargeting	- MadKudu Fastlane	- Website Personalization
- Designated Slack support channel	- MadKudu for Web Chat	- Ad Spend Optimization
- Product Qualified Leads (PQL)	- All Integrations	- Marketing Qualified Accounts (MQA)
- 6000 Leads per month	- 2000 leads per month	- Designated Client Success Team

Source: Own Elaboration(2024)

### 3.4.2. Sales Whale

Saleswhale is an artificial intelligence assistant that engages, qualifies, and converts underserved marketing leads into sales appointments via email, generating pipeline and sales-ready possibilities for your team. It reaches out to prospects in your database using tried-and-true Conversation Plays, engages them in two-way email conversations using human-assisted AI to qualify them, and sends them further information, if necessary, before transferring hot leads to the sales team. It frees up your sales team's time, allowing them to focus on high-value prospects and close agreements while ensuring that no marketing lead goes to waste (Saleswhale, 2024).

**Pricing:**

Saleswhale customized their pricing based on various factors. Their package includes automated follow-up, content distribution, navigating roadblocks, referral handling, out-of-office detection, interest qualification, DNC detection and data collection (SaaS-worthy.com, 2024).

**3.5. Consolidate Data*****3.5.1. Rows.com***

Rows.com is a company that can handle all their connections from a single spreadsheet by using integrations to link to their primary tools – like Slack and Salesforce – or additional data sources – like Google Maps or Crunchbase. With sales templates of Rows.com a business can automate the lead generation or their CRM. In addition, a business can build automated marketing dashboards using their marketing templates. Moreover, internal tools for operations – like order management systems or build tools with own API's – can be created using Rows.com's applications (Rows, 2024).

**Pricing:**

Rows.com offers an annual plan and a monthly plan. Furthermore, both plans have different packages from which companies can choose from (Rows.com, 2024).

Benefits and pricing of the annual plans (Rows.com, 2024):

**Table 10***Rows benefits and pricing of annual plans*

<b>Free</b>	<b>Plus</b>	<b>Pro</b>	<b>Enterprise</b>
\$0	\$15 per user /	\$22 per	Contact us
Get started with Integrations and a slick spreadsheet layout	month, billed annually Unlock all your company data, open AI & Premium Integrations	user/month, billed annually Advanced data skills for teams that want faster data	Data and APIs for custom business workflows
- Unlim ited spreadsheets - Unlim ited team members - Up to 10 guests - 50 Integration executions per month - AI Analyst	- Up to 25 guests - Unlim ited Integration executions - Every hour scheduling - AI Analyst - White -labeled embed	- Everyt hing in Plus - Up to 100 guests - Every minute scheduling - Video support for editors	- Advan ced API endpoints - Custo m AI models, functions and integrations - High volume usage - Custo m themes and designs - SAM L SS0 - Dedic ated CS Manager

Source: Own Elaboration(2024)

Benefits and pricing of the monthly plans (Rows.com, 2024):

**Table 11***Rows benefits and pricing of monthly plans*

<b>Free</b>	<b>Plus</b>	<b>Pro</b>	<b>Enterprise</b>
\$0	\$20 per user /	\$30 per	Contact us
Get started with Integrations and a slick spreadsheet layout	month, billed monthly Unlock all your company data, open AI & Premium Integrations	user/month, billed monthly Advanced data skills for teams that want faster data	Data and APIs for custom business workflows
- Unlim ited spreadsheets - Unlim ited team members - Up to 10 guests - 50 Integration executions per month - AI Analyst	- Up to 25 guests - Unlim ited Integration executions - Every hour scheduling - AI Analyst - White -labeled embed	- Everyt hing in Plus - Up to 100 guests - Every minute scheduling - Video support for editors	- Advan ced API endpoints - Custo m AI models, functions and integrations - High volume usage - Custo m themes and designs - SAM L SS0 - Dedic ated CS Manager

Source: Own Elaboration(2024)

### **3.5.2. Gender-api.com**

The website Gender-API.com provides a valuable service that allows users to determine the probable gender associated with a given first name. This service has a wide range of applications and can be beneficial for businesses and organizations in areas like demographic analysis, marketing strategies, and data validation.

Developers had the opportunity to incorporate Gender-API.com's user-friendly API (Application Programming Interface) into their systems or applications in order to automatically ascertain the probable gender linked to a given first name. By employing statistical analysis and data patterns, the service would commonly make gender predictions based on names (Gender-api.com, 2024).

#### **Pricing:**

Gender-api.com has two different pricing approaches. There is a monthly subscription with different packages of different price categories and there is a one-time payment with various different packages (Gender-api.com, 2024).

Packages for monthly subscription (Gender-api.com, 2024):

**Table 12***Gender API monthly suscription plans*

<b>Free</b>	<b>Basic 1</b>	<b>Basic 2</b>	<b>Premiu m</b>	<b>Ultr a 1</b>	<b>Ultr a 2</b>	<b>Xtrem e 1</b>	<b>Xtreme 2</b>
100 requests / monthly	5 000 requests/ monthly	10 000 requests/ monthly	25 000 requests/ monthly	100 000 requests / monthly	250 000 requests / monthly	500 000 requests/ monthly	1 000 000/ requests/ monthly
0€/ month	6,79€ / month	12,74€ / month	29,75€/ month	67, 15€/ month	126, 65€/ month	169, 15€/ month	211,65€ / month

Source: Own Elaboration(2024)

Packages for one-time payment (Gender-api.com, 2024):

**Table 13***Gender API annual suscription plans*

<b>Basic</b>	<b>Basic 2</b>	<b>Premium</b>	<b>Ultra 1</b>	<b>Ultra 2</b>	<b>Xtreme</b>	<b>Xtreme 2</b>
<b>1</b>					<b>1</b>	
5000	10000	25000	100000	250000	500 000	1 000 000
requests	requests	requests	requests	requests	requests	requests
(valid for one year)	(valid for one year)	(valid for one year)	(valid for one year)	(valid for one year)	(valid for one year)	(valid for one year)
8,49€	14,44€	38,25€	84,15€	152,15€	254,15€	296,65€

Source: Own Elaboration(2024)

### **3.6. Automize**

#### ***3.6.1. Octopuscrm.io***

OctopusCRM.io is a Customer Relationship Management (CRM) software designed to assist organizations in managing relationships with current and potential customers. Additional functionality may have been included in OctopusCRM.io to meet the specific needs of its

intended customers, such as small enterprises, sales teams, or certain industries. Integrations with other corporate tools, customization options, and automation features can all help streamline workflows and increase productivity. OctopusCRM.io is an all-in-on automation tool that simplifies LinkedIn's users prospecting efforts (Octopus CRM, 2024).

**Pricing:**

Octopuscrm.io offers an annual plan as well as a monthly plan. Both plans have several package options to choose from (Octopus CRM, 2024).

Benefits and pricing of monthly packages (Octopus CRM, 2024):

**Table 14***Octopus benefits and pricing of monthly plans*

<b>Starter</b>	<b>Pro</b>	<b>Advanced</b>	<b>Unlimited</b>
\$9,99/ month	\$14,99/ month	\$21,99/ month	\$39,99/ month
- Personal CRM with stats	- Personal CRM with stats	- Personal CRM with stats	- Personal CRM with stats
- Auto invite (personalized)	- Auto invite (personalized)	- Auto invite (personalized)	- Auto invite (personalized)
- Ability to connect with premium LinkedIn users only	- Ability to connect with premium LinkedIn users only	- Ability to connect with premium LinkedIn users only	- Ability to connect with premium LinkedIn users only
	- Send automated messages in bulk	- Send automated messages in bulk	- Send automated messages in bulk
	- Auto view profiles	- Auto view profiles	- Auto view profiles
	- Auto endorse skills	- Auto endorse skills	- Auto endorse skills
		- Create campaigns	- Create campaigns
		- Export/ import data	- Export/ import data
		- Build funnels	- Build funnels
			- Integration w/ Zapier and HubSpot
			- Activity control
			- Bypass weekly invite limit

Source: Own Elaboration(2024)

Benefits and pricing of annual packages (Octopus CRM, 2024):

**Table 15***Octopus benefits and pricing of annual plans*

<b>Starter</b>	<b>Pro</b>	<b>Advanced</b>	<b>Unlimited</b>
\$ 6,99/ billed monthly	\$9,99/ billed monthly	\$ 14,99/ billed monthly	\$24,99/ billed monthly
Includes same features as monthly package starter	Includes same features as monthly package pro	Includes same features as monthly package advanced	Includes same features as monthly package unlimited

Source: Own Elaboration(2024)

Octopuscrm.io offers special packages for marketing agencies that have to manage widespread of companies. Those offers are made by request (Octopus CRM, 2024).

### **3.6.2. Prospect.io**

Prospect.io is a sales prospecting and outreach tool that assists sales teams in locating and engaging with potential leads more effectively. It provides tools to help sales professionals find potential leads based on various factors, such as industry, region, firm size, and job title. This platform can assist businesses in identifying and efficiently targeting suitable prospects. It includes tools for designing and deploying personalized email messages to prospects. Users can utilize email templates, schedule email sends, and measure engagement metrics such as open

rates and click-through rates to evaluate the effectiveness of their outreach efforts (TechnologyAdvice, 2024).

### **Pricing:**

Prospect.io offers three different plans, which should be chosen based on the size of the company.

Pricing of the different packages (Overloop, 2024):

**Table 16**

#### *Prospect.io suscription plans*

<b>Startup</b>	<b>Growth</b>	<b>Enterprise</b>
€49/ user/ month	€82/ user/ month	€125/ user/ month

Source: Own Elaboration(2024)

### 3.6.3. Gong

Gong is an AI-powered revenue intelligence platform that enables firms to increase sales effectiveness and revenue growth. It analyzes sales conversations, including calls and meetings, using natural language processing (NLP) and machine learning algorithms to deliver insights and recommendations that help sales teams win more transactions (Gong, 2024).

#### *Pricing:*

Gong's licensing pricing are based on the number of users chosen. In addition, a platform fee is charged dependent on the number of supported users. The cost of Gong is determined on the license you purchase for your team (Gong, 2024).

## 3.7. Negotiations

### 3.7.1. *Pactum*

Pactum is a global leader in autonomous negotiations. Their offers include commercial term negotiations, contract cost negotiations, purchasing negotiations and integration solutions (Pactum AI Inc., 2024).

The tool utilizes artificial intelligence and machine learning algorithms to analyze negotiation data, identify optimal outcomes, and generate negotiation strategies that maximize value for both parties (Pactum AI Inc., 2024).

#### **Pricing:**

Pricing is not provided and has to therefore be requested by the company.

### **3.8. Obtaining the data**

When we encountered the challenge of enriching lead information, we discovered AI tools specifically designed to address this issue.

These AI solutions have significantly streamlined our data enhancement processes, providing more accurate and comprehensive insights into our leads. By leveraging advanced algorithms, the tools can automatically gather and update critical lead information from various sources, ensuring the database remains current and detailed. All the data is relevant for the period of the project: March-June.

Additionally, to the mentioned tools above, like Leadfeeder, LinkedIn Sales Navigator, Lusha.com, Clearbit, Prospect.io, Octopuscrm.io and Datanyze that are created for the collection of the customer information and lead generation, we found additional AI tools that contribute specifically to the enrichment of NAD (necessary additional data). Here are AI tools available for enriching the data.

#### **3.8.1. Snov.io**

Snov.io can install Email Finder extension to your Chrome search to collect emails on websites and search results pages and enriched targeted prospects in bulk by uploading a list of domains. Moreover, you can upload there your own prospect list to verify, contact, manage and

convert prospects, find company employee email contacts through their company name or domain or find company prospects with contacts by location, size, industry and other filters. Plus, it offers a built-in CRM to manage your sales pipeline, team collaboration features, and integration with your existing email and sales tools for a smooth workflow. This AI tool can help sending personalized emails to the chosen amount of email accounts and avoid triggering spam filters on new accounts (Snov.io, 2024).

### **Pricing:**

Snov.io offers an annual, monthly, and managed service plan. These plans have different packages from which Fortech can choose from.

Benefits and pricing of the annual plans (Snov.io, 2024):

**Table 17***Snov.io benefits and pricing of annual plans*

<b>Trial</b>	<b>Starter</b>	<b>Pro (5k, 20k,50k,100k)</b>
\$0/month	\$30/month	5k – 75\$/month, 20k – 142\$/month, 50k – 277\$/month, 100k – 554\$/month.
Free includes: - Email Finder - Email Verifier - Email Warm-up - Drip Campaigns - Sales CRM - Chrome extensions  Credits/month: Credits: 50, Emails: 100, Mailbox warm-up: 1 unlimited № of users in the team	Everything in Trial, plus: - LinkedIn Automation * - Unlimited follow-ups - Unlimited campaigns (+AI) - Unlimited sender accounts - Unlimited mailbox rotation - Unlimited team seats - Bulk lead search - Bulk verification - Integrations - API & Webhooks - HubSpot integration - Pipedrive integration - Calendly integration - Zapier integration and more - Support - 24-hour support  Credits/month:	Key features in Starter, plus: - Unlimited monthly warm-up volume - Email A/B testing - Campaign priority control - Campaign volume control - New recipients volume control - Follow-up priority option - Spintax - Dynamic content - Teamwork - CRM Teamwork - Team member statistics - Team data access management - Shared do-not-email lists - Shared prospect notes - Support - Prioritized 24-hour support - Personal implementation manager 1-on-1 calls and Q&As  5k: Credits/month: Credits: 5000, Emails: 10000, Mailbox warm-up: unlimited unlimited № of users in the team 20k: Credits/month: Credits: 20000, Emails: 30000, Mailbox warm-up: unlimited unlimited № of users in the team 50k: Credits/month: Credits: 50000, Emails: 50000, Mailbox warm-up: unlimited unlimited № of users in the team

Credits: 1000, Emails: 5000, Mailbox warm-up: 3 unlimited № of users in the team	100k: Credits/month: Credits: 100000, Emails: 100000, Mailbox warm-up: unlimited unlimited № of users in the team
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Source: Own Elaboration(2024)

Benefits and pricing of the monthly plans (Snov.io, 2024):

**Table 18**

*Snov.io benefits and pricing of monthly plans*

<b>Trial</b>	<b>Starter</b>	<b>Pro (5k, 20k,50k,100k)</b>
\$0/month	\$39/month	5k – \$99/month, 20k – \$189/month, 50k – \$369/month, 100k – \$738/month.
Same as in annual plan	Same as in annual plan	Same as in annual plan

Source: Own Elaboration(2024)

Benefits and pricing of the Managed Service plan (Snov.io, 2024):

**Table 19**

*Snov.io benefits and pricing of Managed Service plan*

<b>Managed Service</b>
\$3999/month
It includes:
<ul style="list-style-type: none"> <li>• Custom lead gen &amp; outreach campaign</li> <li>• 1,000+ SOM companies</li> <li>• 1,000+ ICP contacts</li> <li>• 1,000+ UVP messages</li> <li>• AI playbook</li> <li>• 20-40 meetings per quarter</li> </ul>

Source: Own Elaboration(2024)

### ***3.8.2. UpLead***

UpLead can build targeted lead lists based on specific criteria like industry, job title, and location. Additionally, it can access a database of verified business contacts including email addresses, find missing contact information like emails and phone numbers for the existing leads, and score leads based on their potential fit for the business, helping to prioritize the outreach efforts. Moreover, it offers real-time email verification to ensure the accuracy of your contact information, reducing bounce rates and improving the effectiveness of the campaigns (UpLead, 2024).

**Pricing:**

UpLead offers annual plans and monthly plans. These plans have different packages from which Fortech can choose from.

Benefits and pricing of the monthly plans (UpLead, 2024):

**Table 20**

*Up Lead benefits and pricing of monthly plans*

<b>Free Trial (Test drive)</b>	<b>Essentials (The Basics)</b>	<b>Plus (For Individuals)</b>	<b>Professional (For Organizations)</b>
\$0/week	\$99/month	\$199/month	Custom pricing
Free includes: - Verified Emails - Mobile Phones - Chrome Extension	Everything in Free, plus: - CRM - Integration	Everything in Essentials, plus: - Data Enrichment - Email Pattern Intel - Technographic - Advanced Filters - Suppression List Uploads	Everything in Plus, plus: - Buyer Intent Data - All Search Filters - Full API Access - Advanced CRM Integrations - Competitor Intelligence - Team Management - Dedicated Success Manager - Onboarding Specialist - Priority Phone Support
Credits/month: Credits: 5, 1 user	Credits/month: Credits: 170, 1 user	Credits/month: Credits: 400, 1 user	Credits/month: Credits: custom, Custom No of seats

Source: Own Elaboration(2024)

Benefits and pricing of the annual plans (UpLead, 2024):

**Table 21**

*Up Lead benefits and pricing of annual plans*

<b>Free Trial (Test drive)</b>	<b>Essentials (The Basics)</b>	<b>Plus (For Individuals)</b>	<b>Professional (For Organizations)</b>
\$0/week	\$74/month	\$149/month	Custom pricing
Same features as in monthly plan.	Same features as in monthly plan. Credits/month: Credits: 2040, 1 user	Same features as in monthly plan. Credits/month: Credits: 4800, 1 user	Same features as in monthly plan. Credits/month: Credits: custom, Custom № of seats

Source: Own Elaboration(2024)

### **3.8.3. RocketReach**

This AI tool can uncover email addresses, phone numbers, and even social media profiles of decision-makers at companies you want to reach. Moreover, you can use AI to get suggestions for relevant contacts based on your search criteria and past behavior. RocketReach integrates with CRM or email platforms for a smoother outreach process, enabling to seamlessly manage and track communication efforts within the existing systems, like Salesforce, HubSpot, Outreach, Salesloft, Bullhorn and Zapier (RocketReach, 2024).

## Pricing:

RocketReach offers an annual and a monthly plan, with Individual and Teams plans.

These plans have different packages from which Fortech can choose from.

Benefits and pricing of the annual Individual plans (RocketReach, 2024):

**Table 22**

*RocketReach benefits and pricing of individual annual plans*

<b>Essentials (email only)</b>	<b>Pro (email+phone)</b>	<b>Ultimate (email+phone)</b>
\$39/month	\$99/month	\$249/month
Plan includes:	Everything in Essentials, plus:	Everything in Pro, plus:
- Unlimited Personal & Professional Emails	- Unlimited mobile & direct phone numbers	- API access
- 1200 Exports per year	- 3600 exports per year	- 10000 exports per year
- Person search	- Company search	- Salesforce integration
- Browser extension	- Outreach, HubSpot, & Zapier integrations	- Org charts & company trends
- Send 25 emails per day	- Bulk lookups	- CRM enrichment
- Get all lookups upfront	- Technographics	- Send 250 emails per day
Credits/month: Unlimited annual lookups/user	Credits/month: Unlimited annual lookups/user	Credits/month: Unlimited annual lookups/user

Source: Own Elaboration(2024)

Benefits and pricing of the monthly Individual plans (RocketReach, 2024):

**Table 23**

*RocketReach benefits and pricing of individual monthly plans*

<b>Essentials (email only)</b>	<b>Pro (email+phone)</b>	<b>Ultimate (email+phone)</b>
\$80/month	\$150/month	\$300/month
Plan includes:	Everything in Essentials, plus:	Everything in Pro, plus:
- Personal & Professional Emails	- Mobile & direct phone numbers	- API access
- Person search	- Company search	- Salesforce integration
- Browser extension	- Outreach, Hubspot, & Za Zapier integrations	- Org charts & company trends
- Send 25 emails per day	- Bulk lookups	- CRM enrichment
Credits/month: 80 lookups/user	Credits/month: 200 lookups/user	Credits/month: 500 lookups/user
	- Technographics	- Send 250 emails per day
	- Send 100 emails per day	

Source: Own Elaboration(2024)

Benefits and pricing of the annual Teams plans (RocketReach, 2024):

**Table 24***RocketReach benefits and pricing of teams annual plans*

<b>Team Pro (email+phone)</b>	<b>Team Ultimate (email+phone)</b>	<b>Custom (email+phone)</b>
\$83/user/month	\$207/user/month	Custom pricing
Plan includes:	Everything in Team Pro, plus:	Everything in Team Ultimate, plus:
<ul style="list-style-type: none"> <li>- Personal &amp; Professional emails</li> <li>- Person search</li> <li>- Browser extension</li> <li>- Send 25 emails per day</li> <li>- Mobile &amp; Direct phone numbers</li> <li>- Company search</li> <li>- Outreach, HubSpot, &amp; Zapier integrations</li> <li>- Bulk lookups</li> <li>- Technographics</li> <li>- Send 100 emails per day</li> <li>- Add/Reassign Seats</li> <li>- Easy billing</li> </ul>	<ul style="list-style-type: none"> <li>- API access</li> <li>- Salesforce integration</li> <li>- Org charts &amp; company trends</li> <li>- CRM enrichment</li> <li>- Send 250 emails per day</li> </ul>	<ul style="list-style-type: none"> <li>- Dedicated Account Manager</li> <li>- Intent data</li> <li>- Team/Role management</li> <li>- Advanced reporting</li> <li>- Priority support</li> <li>- Single sign on</li> <li>- Send 500 emails per day</li> </ul>
Credits/month: 3600 annual lookups/user Teams of 2 to 5 users	Credits/month: 10000 annual lookups/user Teams of 2 to 5 users	Credits/month: Unlimited annual lookups/user Custom № of users

Source: Own Elaboration(2024)

### **3.8.4. ContactOut**

ContactOut is an AI-powered sales prospecting tool designed to help find professional email addresses and phone numbers for your target audience. It can find leads directly from LinkedIn with the Chrome extension and add them to your outreach campaigns. Additionally, it is possible to use AI-powered email writing suggestions to personalize your outreach for better engagement and create automated email sequences to streamline your sales outreach process.

One downside of this tool that we found important is its challenge in accessing information about small companies, as it lacks the ability to accurately identify them (ContactOut, 2024).

#### **Pricing:**

ContactOut offers annual and monthly plans. These plans have different packages from which Fortech can choose from.

Benefits and pricing of the annual plans (ContactOut, 2024):

**Table 25***ContactOut benefits and pricing of annual plans*

<b>Free</b>	<b>Sales</b>	<b>Recruiter</b>	<b>Team/API</b>
\$0	\$79/month	Custom pricing	Custom pricing, team discounts
Free plan includes: -Work on standard LinkedIn only  Credits/day: Emails: 5, Phone numbers: 2	Sales Plan includes: - Works on Sales Navigator - Salesforce & HubSpot integration - Connect to 5,000+ apps with Zapier integration - Work emails only  Credits/year: Emails:6000, Phone numbers: 600	Recruiter plan includes: - Works on LinkedIn Recruiter Pro & all versions of LinkedIn - Salesforce & HubSpot integration - ATS integrations with Lever, Greenhouse & Bullhorn - Connect to 5,000+ apps with Zapier integration  Credits/year: Emails:12000, Phone numbers: 600	Team/API includes: - API Access - Custom data enrichment - Bulk contact files - Enterprise support  Credits/year: Custom

Source: Own Elaboration(2024)

Benefits and pricing of the monthly plans (ContactOut, 2024):

**Table 26***ContactOut benefits and pricing of monthly plans*

<b>Free</b>	<b>Sales</b>	<b>Recruiter</b>	<b>Team/API</b>
\$0	\$99/month	Custom pricing	Custom pricing, team discounts
Same features as in annual plan.	Same features as in annual plan.	Same features as in annual plan.	Same features as in annual plan.
Credits/day: Emails: 4, Phone numbers: 2	Credits/month: Emails:500, Phone numbers: 50	Credits/month: Emails:1000, Phone numbers: 50	Credits/month: Custom

Source: Own Elaboration(2024)

### 3.9. Enrichment of the Necessary Additional Data

Through our research, we have identified the scope of NAD (necessary additional data) that our AI tools are capable of covering.

We suggest the following NAD (necessary additional data) for the comparison and further evaluation:

- Business unit
- Gender
- Full name
- Job category
- Mother language
- Mobile phone
- Email
- Company name

- Line of business
- Sales representative
- Office manager
- Affiliated company
- Taxation type
- Account type
- Street 1
- Zip/postal code
- City
- Country

Gathering additional and diverse data can support not only the data analysis for the company but also is necessary to enhance communication and outreach efforts. Moreover, it plays a vital role in lead generation strategies, facilitating personalization of interactions with customers. Additionally, it contributes to data enrichment by providing more comprehensive insights into customer demographics and behavior. Furthermore, it aids in the verification and validation of existing data, ensuring its accuracy and reliability for decision-making purposes.

**Figure 2** *Comparison of Enriching AI Tools*

Features	Snov.io	ContactOut	RocketReach	UpLead
<b>Necessary additional data:</b>				
Business Unit	x	x	x	x
Gender		x		
First Name	x	x	x	x
Last Name	x	x	x	x
Job Category	x	x	x	x
Mother Language				
Mobile Phone	x	x	x	x
Email	x	x	x	x
Company Name	x	x	x	x
Line of Business	x	x	x	x
Sales Representative	x	x	x	x
Office Manager	x	x	x	x
Affiliated Company	x			
Taxation Type				x
Account Type				
Street 1			x	x
ZIP/Postal Code			x	x
City	x	x	x	x
Country	x	x	x	x
Industry	x	x	x	x
Easy to Use	x	x	x	x

Source: Own Elaboration(2024)



Each criterion can be described as following:

Ease of Integration with Microsoft Dynamics: Evaluates how seamlessly the AI tools can be integrated with Microsoft Dynamics CRM, ensuring smooth data flow and compatibility.

Appropriate Company Size: Considers whether the AI tools are suitable for covering businesses of different sizes, including small, medium, and large enterprises.

Custom Visualization: Assesses the tools' capability to provide customizable visualizations tailored to specific business requirements.

Data Discovery: Evaluates the tools' ability to discover and extract valuable insights from data sets, facilitating informed decision-making.

Pricing: Analyses the pricing of each tool to determine its affordability and value for money.

Focus: Examines the specific focus or niche of each AI tool, such as lead generation, customer segmentation, or data enrichment.

Data Analysis: Assesses the tools' capacity for in-depth data analysis to extract meaningful insights and make data-driven decisions.

Data Visualization: Evaluates the tools' ability to present data in visually appealing and easily understandable formats.

The comparison allowed us to examine various AI tools, understand their scope of work, and their areas of focus. This facilitated the grouping of tools operating in the same field and will be used for the further evaluation of AI tools.

### 3.11. AI Tools Evaluation

After comparing various AI tools for lead qualification and data enrichment, we conducted an evaluation. This evaluation was organized into five groups based on the scope of the tools. Each group contained AI tools with similar focuses, and we assessed them based on the following criteria: Performance & Accuracy, Ease of Use, Scalability, Flexibility & Customization, Security & Privacy, Cost-effectiveness, Innovation & Up-to-dateness, Interoperability, Ethical Considerations, and User & Market Feedback.

The initial criterion selected for the evaluation of our tools was "Performance & Accuracy." This criterion should assess the efficacy and precision of a tool in performing its intended tasks and in providing accurate data or results. It is of paramount importance that a tool delivers reliable and precise outcomes, as this is essential for a company to make informed decisions based on the provided information. "Ease of Use" was chosen to measure the user-friendliness of the tool. Time is a crucial factor in any business. An easy-to-use tool can reduce time and therefore, training costs. Another evaluation criterion we used is "Scalability", which assesses the tool's ability to grow and handle increasing amounts of work when the business expands. In order for diverse companies to use the tools, customizability is important, and therefore we chose the criterion "Customization & Flexibility". It assesses the evaluation of the extent to which the tool can be tailored to specific customer needs and processes.

"Security and privacy" are of paramount importance in the context of such a tool, as it holds valuable data that should not be delivered to a third party. When evaluating "Cost-effectiveness," we determined whether the investment in the tool delivers good value and fits

within the budget constraints. As the tools should be able to work with Microsoft Dynamics (the current CRM tool), the smooth integration into existing processes is important. Therefore, the criterion "Interoperability" is of significant importance.

The criterion "Ethical considerations" should ensure that the tool's use aligns with the company's values and avoids negative social and ethical impacts. For further evaluation we added the criteria "Innovation & up-to-dateness" in order to ensure not to be outdated in solving these issues as well as "User & market feedback" like ratings provided from people who have used the tool.

Each AI tool was assigned a rating on a scale from 1 to 5, with 1 being the best and 5 being the worst, based on our opinion. Additionally, all the assessed tools are capable of integration with the Microsoft Dynamics.

**Figure 4**

*Lead Generation and Prospecting Tools: finding & collecting potential customer information*

1. Lead Generation and Prospecting Tools: finding & collecting potential customer info								
AI Tool	Leadfeeder	LinkedIn Sales Navigator	Lusha.com	Octopuscrm.io	Prospect.io	UpLead	Datanyze	Clearbit
Performance & Accuracy	2	2	3	2	2	1	3	3
Ease of use	1	1	3	3	2	2	4	2
Scalability	3	3	4	3	2	2	3	2
Flexibility & Customization	2	2	3	2	3	3	4	2
Security & Privacy	2	2	3	3	2	2	3	3
Cost-effectiveness	3	3	3	2	3	2	4	3
Innovation & up to dateness	2	2	4	3	2	2	4	3
Interoperability	2	2	3	2	2	2	3	2
Ethical considerations	2	2	3	3	2	2	3	3
User & market feedback	2	2	3	2	2	1	3	3
<b>Total</b>	<b>21</b>	<b>21</b>	<b>32</b>	<b>25</b>	<b>22</b>	<b>19</b>	<b>34</b>	<b>26</b>
<b>Brief Tool Explanation</b>								
Leadfeeder: identifying website visitors								
LinkedIn Sales Navigator: integrated with LinkedIn								
Lusha.com: accurate contact data								
UpLead: accurate contact data								
Clearbit: accurate contact data								
Octopuscrm.io: specializes in LinkedIn automation								
Prospect.io: integrates email finding and outbound automation								
Datanyze: provides technographic insights additionally to contact data								

Source: Own Elaboration(2024)

**Figure 5**

*Sales Intelligence and CRM tools: provide insights & automation to enhance sales processes*

<b>2. Sales Intelligence and CRM tools: provide insights &amp; automation to enhance sales processes</b>				
AI Tool	Gong	Drift	Conversica	Octopuscrm.io
Performance & Accuracy	3	3	3	2
Ease of use	2	2	2	2
Scalability	2	2	2	3
Flexibility & Customization	2	2	2	3
Security & Privacy	3	3	3	2
Cost-effectiveness	3	3	3	2
Innovation & up to dateness	3	3	3	3
Interoperability	2	2	2	3
Ethical considerations	3	3	3	2
User & market feedback	3	3	3	2
<b>Total</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>24</b>
<b>Brief Tool Explanation</b>				
Gong: focus on analyzing and improving sales conversations				
Drift: uses chatbots for real-time engagement				
Conversica: AI to automate follow-up and engagement				

Source: Own Elaboration(2024)

**Figure 6**

*Marketing Automation and Customer Engagement Tools: assist in automating marketing tasks and customer engagement*

<b>3. Marketing Automation and Customer Engagement Tools: assist in automating marketing tasks and customer engagement</b>			
AI Tool	Emarsys	MadKudu	Saleswhale
Performance & Accuracy	3	2	2
Ease of use	2	2	2
Scalability	2	1	2
Flexibility & Customization	2	2	3
Security & Privacy	3	2	3
Cost-effectiveness	3	3	3
Innovation & up to dateness	3	2	2
Interoperability	2	2	3
Ethical considerations	3	2	3
User & market feedback	3	2	2
<b>Total</b>	<b>26</b>	<b>20</b>	<b>25</b>
<b>Brief Tool Explanation</b>			
Emarsys: omnichannel marketing automation and customer engagement			
MadKudu: predictive analytics to prioritize leads based on likelihood of conversion			

Source: Own Elaboration(2024)

**Figure 7**

*API and Integration Tools: offer APIs for custom integration into other systems*

<b>4. API and Integration Tools : offer APIs for custom integration into other systems</b>				
<b>AI Tool</b>	<b>Datanyze</b>	<b>MadKudu</b>	<b>Saleswhale</b>	<b>Emarsys</b>
Performance & Accuracy	3	2	2	2
Ease of use	2	2	2	2
Scalability	2	2	2	2
Flexibility & Customization	3	2	3	2
Security & Privacy	3	3	3	2
Cost-effectiveness	3	3	3	3
Innovation & up to dateness	3	2	2	2
Interoperability	2	2	3	2
Ethical considerations	3	2	3	2
User & market feedback	3	2	2	2
<b>Total</b>	<b>27</b>	<b>22</b>	<b>25</b>	<b>21</b>
<b>Brief Tool Explanation</b>				
Datanyze: provides technographic and contact data via API				
MadKudu: predictive analytics to prioritize leads based on likelihood of conversion				
Saleswhale: AI driven lead engagement via API				
Emarsys: offer full marketing automation suite via API				

Source: Own Elaboration(2024)

**Figure 8**

*Miscellaneous: do not fit into the above categories*

<b>5. Miscellaneous: don't fit into the above categories</b>			
<b>AI Tool</b>	<b>Google Alerts</b>	<b>Rows.com</b>	<b>Gender-api.com</b>
Performance & Accuracy	3	2	3
Ease of use	1	2	2
Scalability	2	3	3
Flexibility & Customization	4	2	3
Security & Privacy	2	3	3
Cost-effectiveness	1	2	3
Innovation & up to dateness	3	2	3
Interoperability	3	2	3
Ethical considerations	2	3	3
User & market feedback	2	2	3
<b>Total</b>	<b>23</b>	<b>23</b>	<b>29</b>
<b>Brief Tool Explanation</b>			
Google Alerts: primarily content monitoring tool			
Rows.com: versatile spreadsheet tool for data automation			
Gender-api.com: determines gender from names - personalized communication			

Source: Own Elaboration(2024)

These evaluation tables allowed us to identify the tools that meet all the criteria and requirements, making them suitable for Fortech for lead generation and data enrichment, as well as other tools that can enhance work automation.

#### 4. Web Scraping

To collect necessary data for the qualification and classification another solution would be Web Scraping. For web scraping we need the URL of the lead and could then extract data like telephone numbers, addresses, contact information and so on.

Web Scraping is a process that extracts data automatically from the web. The data that we would like to scrape has to be made publicly from the website. Unfortunately, web scraping is not a fool-proof solution because the data will need to be available, and data cannot be extracted from a visual or so. Still, web scraping is a useful tool for lead generation as you can easily create database lists (Holcombe 2023).

Important remark: Web scraping per se is not illegal, but it can raise legal and ethical concerns. It must be made sure that you only scrape information that has been made available by the website owner (Hasson 2023).

Web scraping is an extremely useful tool, but it will have to be done carefully to not cross lines. Still, how it would collect the missing data from the lead's URL should not be problematic as only data that is already made publicly will be collected.

How does Web Scraping work? There are two steps that Web Scraping does, first crawlers browse the website, and then the scrapers extract the relevant information. Most Web Scraping tools have pre-programmed crawlers and scrapers (Hasson 2023).

Before choosing a Web Scraper, you have to pay attention to their precise locators, the data quality and delivery, the anti-scraping handling, the transparent pricing and the customer support they offer (Hasson 2023).

*How to choose the right Web Scraping Tool:* When you decide to implement a web scraping tool, you have to know what you want to do with it before you subscribe. For Fortech the most interesting tasks of that can be done by is the lead generation and open data collection. Of course, there are differences between the different web scrapers ranging from the room for scaling up or the price to the anti-bot solutions. The perfect web scraper will not have a limited bandwidth and will have enough anti-bot solutions to avoid being blocked. It is important to pay attention to the price and costs as some tools are not up-front with their pricing, which means they are not confident in the ability of their solution, or they are hiding additional costs (ZenRows 2023).

## **4.1. Web Scraping Tools**

### ***4.1.1. ParseHub***

ParseHub is an easy-to-use web scraper which does not require coding. Basically, you download the app enter the links and the tool then extracts the data that you selected. ParseHub can also be used for lead generation. As it features API the anti-bot solutions should work (ParseHub.com, 2024).

**Pricing:**

Benefits and Pricing (ParseHub.com, 2024):

**Table 27***ParseHub benefits and pricing*

<b>Everyone</b>	<b>Standard</b>	<b>Professional</b>	<b>ParseHub Plus</b>
\$0	\$189/month	\$599/month	Custom pricing
Get 200 pages of data in only 40 minutes	Get 200 pages of data in only 10 minutes	Get 200 pages of data in under 2 minutes	Let ParseHub experts scrape and deliver your data
200 pages per run	10,000 pages per run	Unlimited pages per run	Premium service with priority support
5 public projects	20 private projects	Priority support	Includes free data export samples
Limited support	Standard support	Data retention for 30 days	One-Time Scraping Projects and Ongoing Web Scraping
Data retention for 14 days	Data retention for 14 days	Rest features the same as the standard packages	Dedicated Account Manager
	Save images & files to DropBox or S3		Custom-made ParseHub Features
	IP Rotation		
	Scheduling		

Source: Own Elaboration(2024)

### ***4.1.2. Octoparse***

You do not need to code for Octoparse as you can design your personal web scraper in a workflow designer and the AI integration will give you tips and help you avoid mistakes. Additionally, Octoparse makes guides, tutorials and blog posts available to everyone, where they explain how to scrape the information you want and from where. The lead generation of Octoparse cannot only simply find new leads but it as well gathers information like names, email addresses, phone numbers, job titles, the company and position. It can be used for data enrichment and to find the missing data in the qualifying and verification process (Octoparse, 2024).

#### **Pricing:**

Pricing and Benefits (Octoparse, 2024):

**Table 28***Octoparse benefits and pricing*

<b>Free Plan</b>	<b>Standard Plan</b>	<b>Professional Plan</b>	<b>Enterprise Plan</b>
\$0	\$58/month	\$166/month	Custom pricing
10 tasks	100 tasks	All features in	All features in
Run tasks on local devices only	Run tasks with up to 6 concurrent cloud processes	Standard, plus: 250 tasks	Professional, plus: 750 or more tasks
Up to 10K data rows per export	IP rotation	Up to 20 concurrent cloud processes	40 or more concurrent cloud processes
Unlimited pages per run	Local boost mode	Advanced API	Expansive capacity
Limited support	100+ preset task templates	Auto backup data to cloud	Online web console
	IP proxies	Priority support	Team collaboration (1 admin and 2 agent seats)
	CAPTCHA solving	Task review & 1-on-1 training	Dedicated success manager
	Image & file download		
	Automatic export		
	Task scheduling		
	API access		
	Standard support		

Source: Own Elaboration(2024)

#### 4.1.3. Zyte

Zyte offers that you can code your own solution or that you work with their developers. They also work with different proxies and servers as their anti-bot solution. Furthermore, you will not have to worry about compliance issues as they have their own legal team to make sure

everything is handled correctly. The price is per raw response or rendered response per 1000 requests, but they also offer a signup to try it live for free (Zyte, 2024).

### Pricing:

Benefits and Pricing of the Zyte Data Packages, they also offer other services but those are in this case not relevant (Zyte, 2024):

**Table 29**

#### *Zyte benefits and pricing*

<b>Standard</b>	<b>Sales</b>
\$450/month	From \$1000/month
<ul style="list-style-type: none"> <li>• Standardized data schema</li> <li>• Predefined crawl frequency</li> </ul> Data delivered to Amazon S3 bucket in JSON format <ul style="list-style-type: none"> <li>• Post-processing available as an upgrade</li> </ul> Standard Service levels <ul style="list-style-type: none"> <li>• Proven quality assurance methodology</li> <li>• Dedicated team and support</li> <li>• Sample data sets</li> <li>• Legal, CCPA and GDPR Compliance</li> </ul>	<ul style="list-style-type: none"> <li>• Bespoke data schema</li> <li>• A range of output formats &amp; cloud delivery options (e.g. JSON, CSV, etc.)</li> <li>• Enterprise level SLA</li> <li>• Flexible and scalable solutions</li> <li>• Control your own crawls (e.g. frequency, input)</li> <li>• Proven quality assurance methodology</li> <li>• Dedicated team and support</li> <li>• Sample data sets</li> <li>• Legal, CCPA and GDPR Compliance</li> </ul>

Source: Own Elaboration(2024)

#### **4.1.4. WebHarvy**

By using WebHarvy you can scrape diverse data like texts, emails and URLs and save them in various data formats. You do not need to code to use WebHarvy as it has a simple point and click interface and you can decide on which data should be scrapped. When the data is repetitive it will scrape it automatically. Another function is that it can scrape data from connected websites. Their anti-bot solution is to scrape via proxy servers or VPN (Virtual Private Network). Furthermore, WebHarvy enables you to scrape data from a list with the links (WebHarvy, n.d.).

#### **Pricing:**

Benefits and Pricing (WebHarvy, n.d.):

**Table 30***WebHarvy benefits and pricing*

<b>Single User License</b>	<b>2 User License</b>	<b>3 User License</b>	<b>4 User License</b>	<b>Site License</b>
\$129	\$219/month	\$299/month	\$359/month	\$699/month
1	2	3	4	Unlimited
User/Computer	Users/Computers	Users/Computers	Users/Computers	Users
1 Year Free	1 Year Free	1 Year Free	1 Year Free	1 Year Free
Updates	Updates	Updates	Updates	Updates
1 Year Email Support	1 Year Email Support	1 Year Email Support	1 Year Email Support	1 Year Email Support
Lifetime	Lifetime	Lifetime	Lifetime	Lifetime
access to valid versions	access to valid versions	access to valid versions	access to valid versions	access to valid versions

Source: Own Elaboration(2024)

**4.1.5. Data Miner**

Data Miner is an Edge Browser and Google Chrome extension, which helps you to scrape data from websites and it then puts them into a CVS (comma-separated values) files or Excel files. Additionally, you do not have to code as you can use the premade data extraction rules or develop your own rules to get a customized web scrapper. Data Miner can automatically scrape data from subpages and other pages to scrape data. It offers a broad range of different scraping rules in one place, and you do not need to code. According to their website you will not get blocked as they are not a bot, so anti-bot software's will not detect them. Another advantage is

that the data you scrape will not be shared or sold. Furthermore, Data Miner can run bulk scrapes this means that you provide a list with URLs, and they will scrape the data from the mentioned websites (Data Miner, 2021).

### Pricing:

Benefits and Pricing (Data Miner, 2021):

**Table 31**

*Data Miner benefits and pricing*

<b>Free</b>	<b>Solo</b>	<b>Small Business</b>	<b>Business</b>	<b>Business Plus</b>
\$0	\$19.99/month	\$49/month	\$99/month	\$200/month
Scrape 500 pages/month	All features of the Free version	Scrape 1,000 pages/month	Scrape 4,000 pages/month	Scrape 9,000 pages/month
Use Public & Create new recipes	Run Custom JavaScript	Same features as Solo Package	Same features as Small Business	Same features as Business
Next page automation	Scrape all domains			
Restricted on some domains	Create Public Recipes			
	Google Sheets Connection			
	Full Email support			

Source: Own Elaboration(2024)

Furthermore, they offer Custom Large Scraping Solutions with flexible pricing plans to fit different needs (Data Miner, 2021).

#### ***4.1.6. Apify***

Apify offers a wide range of web scraping solutions which can be used for lead generation and data enrichment. Furthermore, they also offer to create a personalized solution. They have a lot of recommendations and reviews and work with well-known companies like Siemens and Samsung (Apify, 2024).

#### **Pricing:**

Apify offers 5 different packages where you pay a certain subscription and afterwards you pay for what you used. The packages are Free (\$0/month, \$5 free usage), Starter (\$49/month, pay as you go), Scale (\$499/month, pay as you go), Business (\$999/month, pay as you go) and Enterprise Custom (Custom prices, contact them) (Apify, 2024).

#### ***4.1.7. Content Grabber/Sequentum***

Content Grabber is mostly used for decision making and to gather customised information for critical analysis. It offers a low-code solution which uses the point-and-click solution, and you can get the data delivered in any format that you require. You can get the data from web sources and other sources like databases or files, and it uses IP rotation and other anti-bot solutions to get the information you need. Their products include risk alerts, intelligent agent, and an enterprise data platform. For Fortech the enterprise data platform is of interest and there you can decide between three different packages (Sequentum, 2024).

#### **Pricing:**

Unfortunately, the pricing from Content Grabber is not transparent. We were unable to find pricing and solution package information.

#### **4.1.8. Mozenda**

Mozenda offers web scraping solutions where you do not need to hire developers or to code. You can build your own web scraper by selecting which data you want to scrape by using their point and click feature. You can either get the licensed software where you would work with Mozenda or you get their managed data services where they offer to work for you. They offer several different solutions to enable you to customize your web scraper exactly to your needs (Mozenda, 2024).

#### **Pricing:**

Mozenda's pricing is also not very transparent. Nevertheless, you can calculate an approximate quota for your planned utilisation on the website (Mozenda, 2024).

#### **4.1.9. ZenRows**

ZenRows offers very good and different anti-bot solutions to guarantee that you can get the necessary data. Furthermore, they are very transparent about their prices and their different

packages, and you are able to cancel your subscription at any time. Additionally, they offer you different customer supports depending on which package you choose. Unfortunately, ZenRows does not offer a finished web scraping package, but they give you all the tools and information you need to successfully web scrape (ZenRows, 2024).

### **Pricing:**

Pricing and Benefits (ZenRows, 2024):

You can try out all plans except the Enterprise one for free.

**Table 32***ZenRows benefits and pricing*

<b>Developer</b>	<b>Startup</b>	<b>Business</b>	<b>Enterprise</b>
\$69/month	\$129/month	\$299/month	Custom pricing
Residential Proxies - \$5,5/GB Scraper API - \$0,28/CPM or \$7/CPM protected 10 Concurrent Requests Antibot Capabilities 99.1% Uptime Guarantee	Residential Proxies - \$5,25/GB Scraper API - \$0,13/CPM or \$3,5/CPM protected Everything from Developer plan 25 Concurrent Requests 99.3% Uptime Guarantee Chat Support Automatic Retries	Residential Proxies - \$5/GB Scraper API - \$0,10/CPM or \$2,5/CPM protected Everything from Startup plan 50 Concurrent Requests AI Web Unblocker Priority Support Alerts & Notifications Advanced Analytics	Residential Proxies Scraper API Everything from Business plan Custom Concurrent Requests 99,9% Uptime Guarantee Dedicated Account Manager Alerts & Notifications Advanced Analytics

Source: Own Elaboration(2024)

#### **4.2. Web Scraping Tools Evaluation**

For the evaluation of the mentioned above web scrapers we decided on nine different criteria, which analyze the most important aspects of the tools. For the value weighting of the web scrapers, we decided on a 30-point system, the points are allocated to the criteria in a way that shows the importance. The maximum of points on criteria can get is five points and the lowest is 2 points. The criteria are the following including a short description and how many points they can achieve with fulfilling the criteria:

Code yourself: This criterion can get up to 3 points. Full mark is possible if you can code yourself but also get supported by the tool and it offers already finished parts to create your own web scraper.

Finished packages: This criterion can get up to 2 points. Full mark is possible if they offer a range of finished products and not just one solution.

Anti-bot solution: This criterion can get up to 3 points. Full mark is possible when it is clear which anti-bot solutions they use and if they explain them/ they offer more than one.

Data delivery & quality: This criterion can get up to 2 points. Full mark is possible if they explain how they deliver data, and it is data that is useful for Fortech.

Transparent pricing: This criterion can get up to 4 points. Full mark is possible if they list all the different packages with their prices and it is easy to calculate what you will pay for using the web scraper.

Different packages: This criterion can get up to 5 points. Full mark is possible if they offer different packages and clearly define what is included in the package and its price.

Customer support: This criterion can get up to 5 points. A full mark is possible if they clearly define which support is offered for which package. Another way to get full marks is to offer customer support and it is easy to get support.

Ease of use: This criterion can get up to 4 points. Full mark is possible if the web scraper is easy to use and you see how it works or could work at one glance.

Mentioned data formats: This criterion can get up to 2 points. Full mark is possible when they mention in which data formats you can receive the scraped data.

Figure 9

Comparison Table of Web Scraping Tools

Criteria	Information about criteria	Points per criteria (in total 30)	Web Scraping Tool																	
			Parsehub		Octoparse		Zyte		Webharry		Data Miner		Apify		Content Grabber		Moenda		ZenRows	
			offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points	offers criteria	points
N/A = Non-applicable/no answer																				
	if x -> possibility to code yourself	3	N/A	0	x	2	x	1	N/A	0	x	2	x	2	x	2	x	1	x	3
	code yourself																			
	if x -> they offer already finished packages or offer to build you a personalized webcrawler	2	x	1	x	2	x	2	x	1	x	1	x	1	N/A	0	x	2	N/A	0
	finished package																			
	if x -> they mention the different anti-bot solution they offer	3	x	3	x	2	x	3	x	1	x	3	x	2	x	1	x	1	x	3
	anti-bot solutions																			
	if x -> it is obvious on the website that they offer services which provide the right data and how	2	x	1	x	1	x	1	x	1	x	1	N/A	0	x	2	x	2	N/A	0
	data delivery & quality																			
	if x -> there is a clear listing of the prices of the different packages, the prices are mentioned	4	x	4	x	3	x	3	x	3	x	4	x	4	N/A	0	x	1	x	4
	transparent pricing																			
	if x -> they offer more than one solution, they have different packages from which you can choose	5	N/A	4	x	4	x	4	N/A	4	x	3	x	3	x	2	x	4	x	4
	different packages																			
	if x -> it is clear how the customer support works and which type of support you get by hiring them	5	N/A	3	x	3	x	3	N/A	3	x	4	x	2	x	2	x	5	x	4
	Customer support																			
	if x -> they explain how to use the webcrawler in a way that is easy to understand	4	x	4	x	3	x	3	x	2	x	4	x	2	x	3	x	3	x	2
	ease of use																			
	if x -> they mention in which data format you can save the extracted data	2	N/A	2	x	2	N/A	0	x	1	x	2	x	2	x	2	x	1	N/A	0
	mentioned data formats																			
	Points obtained	max. 30		22		22		20		16		24		18		14		32		20

Source: Own Elaboration(2024)

## 5. Quality Verification Methods

As part of ongoing efforts to improve customer interactions and optimize marketing and sales strategies, we have started the initiative to explore the use of AI-based solutions. This part of the report outlines the objectives on a basic level and describes tools selected to work during this initial state.

In terms of method verification, we aim through the tool Clearbit to increase the amount of client data, link it with the CRM database and further analyze it by using a data analytics platform that would enable quick identification and ranking of clients. Besides demographics, social media profiles, contact details and company size are among other vital data which should be collected by Clearbit.

Thereby, integrating this information into a CRM allows us to have precise and updated knowledge about each individual buyer. We can perform behavior analysis, audience segmentation, and sales forecasting using the advanced analytic features of these platforms. This helps us to target resources appropriately, provide personalized marketing and sales strategies, and maximize our chances of success as much as possible. It's an iterative procedure that needs constant readjustments to improve on it and evolve when necessary.

## **5.1. Complete customer information**

### ***5.1.1. Clearbit***

Clearbit is a data enrichment platform that focuses on providing more information about individuals and companies. Its approach to achieving this objective involves integrating varied data sources, as well as open-access online search engines, third-party data integration, web scraping tools for structured and unstructured data extraction, artificial intelligence and machine learning technologies (Automatically Append Fresh Social And Company Data To Leads, 2024).

In real-time businesses can instantly append additional details to their customer profiles by syncing Clearbit with email marketing systems, CRM platforms, and other necessary company applications. As a result of this process, the exactness of information is guaranteed in addition to preserving time as there would be no need for manual entry or search (Data Enrichment Tool For Converting More Leads, 2024).

## **5.2. Integrate data into a CRM**

### ***5.2.1. Salesforce***

Its extensive feature set covering customer support, sales, marketing and personalization makes it one of the most popular and widely adopted CRMs on the market. It is appropriate for businesses of all sizes and sectors due to its high degree of flexibility and scalability that allows it to adapt to different company needs. Additionally, it has a large user base and numerous long connectors with other business products (CRM Analytics: Salesforce Data Analytics, 2024).

## **5.3. Use data analysis platforms with CRM**

### ***5.3.1. IBM Watson Analytics***

Potential buyers' data of the customers are thus collected by IBM Watson Analysis where after analysing the data flow, it becomes apparent that some of the customers would be of quality for the company. Spending time to examine the needs, occupation and interaction of the richest

or possibly the most likely customer requires data from factors like demography, shopping behaviour, service contacts or even questionnaires combined with segmentation and prediction techniques. In this context, it should be linked to the CRM systems which could be done with Salesforce to extract the data and analyse it before transferring the qualified leads back to the main database.

During the information gathering process, IBM Watson Analytics can assist you in building the right profile picture of the target consumers to point out the biggest clients and thus filter for those who are loyal and can be great sources of consistent revenues for longer durations. However, an automated qualification test is performed, where the lead is evaluated based on certain criteria such as web activities or email correspondence and assigned a score accordingly (Analytics Tools And Solutions, 2024).

### ***5.3.2. Salesforce Einstein Analytics***

Customer modelling is another process that uses Salesforce Einstein Analytics. Salesforce Einstein Analytics utilizes data analytics and machine learning algorithms to identify patterns and categorize them depending on their profitability index. It can guide the targeting efforts to focus only on the desired customers by applying managerial competence and providing tailored and implementable advice on marketing and selling strategies to speed up the processes and get the best results. Moreover, performing activities whenever it is beneficial to do so is facilitated by an integration with a CRM.

In improving relationship with customer, the first step taken by the company was to consider possibilities of using AI instruments. However, as soon as we learned that Fortech uses Microsoft Dynamics CRM to manage client relations, we had to abandon this line of work completely and start searching for AI tools compatible with this platform (Vladikder, 2024).

Since Fortech has Microsoft Dynamics 365 as CRM, it is necessary to consider other tools that can help integrate with this system easily. Therefore, we find these artificial intelligence tools:

### ***5.3.3. Leadfeeder***

Leadfeeder is an AI-driven tool that transforms website visitors into qualified B2B leads by providing real-time insights into visitor behaviour. It identifies companies visiting your website within minutes, tracks pages viewed and visit durations, and helps prioritize leads based on engagement levels. With customizable filters, businesses can target leads based on specific criteria such as industry, location, and company size. Additionally, Leadfeeder integrates seamlessly with CRM systems like Salesforce and marketing tools like Mailchimp and HubSpot, enhancing overall outreach strategies (Leadfeeder, 2024).

**Pricing:**

On pages 13 and 14 of the document, you will find detailed information about the price of the product or service. It is important to highlight that the price is uniform for all clients, without variations or distinctions. This means there is no need to worry about additional charges or hidden fees as the set price is the same for everyone.

Recently, Leadfeeder has merged with Echobot to form Dealfront, focusing on the European market and offering more comprehensive sales intelligence capabilities. This new platform's entry-level plan costs around \$221 per month, with more advanced features available at higher tiers up to \$1100 per month (Dealfront, 2024).

**5.3.4. Power BI**

Power BI offers a broad range of data visualization tools, including pie charts, bar charts, and maps, enabling users to convert complex data sets into clear visuals. It allows the creation of dashboards for high-level overviews and detailed reports.

Additionally, Power BI integrates smoothly with Microsoft products like Excel, Azure, and Dynamics 365, as well as third-party applications such as Google Analytics and Facebook, facilitating comprehensive data analysis.

Users can also develop custom visuals to cater to specific industry and business needs, making the tool highly versatile (Power BI, 2024).

AI and Machine Learning: As seen on page 53, Power BI includes AI features like data analysis expressions and machine learning models, which help in creating predictive analytics and deeper insights.

Real-time Data Access: The platform offers real-time data connectivity, ensuring that reports and dashboards are always up to date with the latest information.

### **Pricing:**

The tool Power BI provides different plans, that can be either paid or free (Power BI, 2024):

Benefits and features of different plans:

**Table 33***Power BI benefits and features*

<b>Free</b>	<b>Paid</b>		
Power BI Desktop (\$0/month)	Power BI Pro (\$10/month)	Power BI Premium (\$20/month)	Power BI Embedded (Variable)
Plan includes: - Create, view and share reports. - Connected to various data source - Perform data transformation	Plan includes: - Everything in free plan - Collaboration, sharing, publishing capabilities - Enhanced data refresh rate - Ability to embed PowerBI visuals in PowerApps	Plan includes: - Everything in pro version - Advanced features like paginated reports - Larger data capacity - Dedicated cloud compute and storage resources for needs	Plan includes: - Create customer pricing reports, dashboards and analytics in your own applications - Automate monitoring, management and deployment - Reduce developer overhead

Source: Own Elaboration(2024)

### **5.3.5. Tableau**

With interactive, visual analytics, Tableau is a potent business intelligence and data visualization solution that assists users in comprehending and interpreting their data. Businesses and organizations utilize it extensively to convert unprocessed data into useful insights. Tableau provides customizable deployment choices, such as Tableau Public, Tableau Server, and Tableau Cloud. Tableau Cloud is a completely hosted online solution that ensures high availability, scalability, and security while offering all of Tableau's functionalities without requiring onsite equipment. With Tableau Server, businesses can host Tableau within their own IT environment, giving them more control over infrastructure and data. Tableau Public is a free tool for making interactive data visualizations that can be shared publicly.

By integrating Tableau with Dynamics 365, users can create a unified view of their data, combining CRM and ERP data for a holistic view of business operations. Tableau's advanced visualization capabilities enhance the reporting functionalities of Dynamics 365, allowing for detailed, interactive reports that provide deeper insights into sales, marketing, customer service, and other business areas (Tableau, 2024).

**Pricing:**

Tableau offers different packages that are billed annually (Tableau, 2024):

**Table 34***Tableau suscription plans*

<b>Free</b>	<b>Paid</b>		
Tableau Public	Tableau Creator (\$70/month)	Tableau Explorer (\$42/month)	Tableau Viewer (\$15/month)
Plan includes: <ul style="list-style-type: none"> <li>- Users can create interactive dashboards and visualizations.</li> <li>- Visualization is stored in Tableau's public cloud</li> <li>- Limited data privacy and security</li> </ul>	Plan includes: <ul style="list-style-type: none"> <li>- Everything in free plan</li> <li>- The plan provides all the tools necessary for end-to-end data analysis, from data preparation to visualization.</li> <li>- Users can choose between cloud-based, or on-premises deployments based on their organizational needs.</li> <li>- Shared dashboard and collaborate with team members</li> </ul>	Plan includes: <ul style="list-style-type: none"> <li>- Everything in free plan</li> <li>- Allows users to explore trusted data and create interactive dashboards and visualizations.</li> <li>- Can perform self-service analytics</li> <li>- Users can create subscriptions for others, ensuring that key stakeholders receive regular updates and insights automatically.</li> </ul>	Plan includes: <ul style="list-style-type: none"> <li>- View and interact with dashboards and visualization in a secure, easy-to-use platform</li> </ul>

Source: Own Elaboration(2024)

### 5.3.6. Qlik Sense

In the business intelligence (BI) and data visualization area, Qlik Sense is an established supplier with strong capabilities and adaptable price options to suit different types of organizational requirements.

With Qlik Sense's simple drag-and-drop interface, users can generate intelligent dashboards and visualizations without needing to know a lot of technical jargon. The connected data engine is one of its unique characteristics, it allows users to dynamically explore relationships across numerous data sources, leading to greater insights and discoveries. Data-driven decision-making is made possible by Qlik Sense's support for integration with advanced analytics tools, which improve predictive analytics capabilities.

Users can collaborate and share knowledge and data more easily with the real-time collaboration options, as they guarantee that all users are working with the most recent data (Qlik Sense, 2024).

#### **Pricing:**

Qlik Sense offers different plans for the businesses (Qlik, 2024):

Table 35

*Qlick Sense suscription plans*

Free	Paid		
Qlik Sense Cloud free	Qlik Standard (\$825/month)	Qlik Premium (\$2.700/month)	Qlik Enterprise (Quote)
Plan includes:	Plan includes:	Plan includes:	Plan includes:
<ul style="list-style-type: none"> <li>- Create visually interactive analytics</li> <li>- Utilize secure cloud environment</li> <li>- AI-generated analyses and insights</li> </ul>	<ul style="list-style-type: none"> <li>- Starts at 25 GB</li> <li>- Purchase Full Users only</li> <li>- Multi-source integration, has interactive visualization, has AI analytics, has built-in analytics, and has mobile availability</li> <li>- 24x7 critical customer support &amp; digital onboarding</li> <li>- Unlimited experiments, 1 model included.</li> <li>- 5,000 automation runs/mo included.</li> <li>- 1,000 reports/month included.</li> </ul>	<ul style="list-style-type: none"> <li>- Starts at 50 GB</li> <li>- Up to 100,000 Basic Users*, purchase Full Users only.</li> <li>- Multi-source integration, has interactive visualization, has AI analytics, has built-in analytics, and has mobile availability</li> <li>- Standard + guided customer success onboarding</li> <li>- Unlimited experiments. 2 deployed models included.</li> <li>- 5,000 automation runs/mo included.</li> <li>- 5,000 reports/month included. More</li> </ul>	<ul style="list-style-type: none"> <li>- Starts at 500 GB</li> <li>- Up to 100,000 total Users</li> <li>- Multi-source integration, has interactive visualization, has AI analytics, has built-in analytics, and has mobile availability</li> <li>- Standard + guided customer success onboarding</li> <li>- Unlimited experiments. 2 deployed models included. More available upon request.</li> <li>- 5,000 automation runs/mo included. More available upon request.</li> </ul>

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available upon request.	- 25,000 reports/month included. More available upon request.
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Source: Own Elaboration(2024)

#### 5.4. Comparison of the Tools

After that, we described the set of features that mattered the most according to our objective and made a comparative table where we noted the significant distinctions. The comparison was based on the following criteria:

Integration with Microsoft Dynamics CRM: This criterion evaluates the extent to which the AI tool can be integrated into Microsoft Dynamics CRM and this integration being smooth without any complexities. The implementation of the informatics system must not interrupt the ongoing activities and processes of the clinic to avoid complications.

Appropriate Company Size: Depending on the type and size of the business (large, medium and small companies), some tools will prove more useful than others; those designed especially for small businesses, for instance, may not be as effective in the case of a medium or large business. This criterion considers the volume, the complexity, and the number of users when surveying this application.

Custom Visualization: This criterion measures the customization capability of the selected AI tool in generating appropriate visuals that represents the data clearly and

comprehensibly. It also includes the ability to quickly make several visualizations to test them, select the one that corresponds to the user's needs and is suitable for the target audience.

*Data Discovery:* This criterion evaluates how effectively the tool can help the users in identifying the patterns that are present in their data or any anomalies or trends that one might not easily notice. Good tools to find data help users access information that is embedded in large amounts of data and make wise decisions.

*Pricing:* This criterion assesses pricing strategies and complementary costs of expended AI tools explored. Here, essential aspects like one-time license fees, monthly/annual subscription fees, and extra modules/components are covered for the evaluation of pricing models.

*Focus:* This criterion involves giving a summary of the model strengths or the areas of competence of the AIs concerned. It points to the type of work for which it is well-suited, whether it is simple report writing, higher levels of data discovery, or identification of patterns.

*Data Analysis:* This criterion assesses the tools' ability to work with data where it will be subjected to data cleaning, transformation, statistical analysis and other operations. Advanced data analysis proficiency prepares and analyses data for evaluative purposes successfully.

*Data Visualization:* This criterion evaluates the capability of the tool to generate a variety of graphs and other items, including charts, maps, and other figures. What's more, it is crucial to know that sharing the gained data insights shall be clear and persuasive for the users.

**Figure 10***Comparison Table of Verification Tools*

AI tool	Power IB	Tableau	Qlick Sense	Leadfeeder
<b>Intgration with Microsoft Dynamics</b>	Includes pre-built native connectors	Requires third-party plugins or connectors	Requires third-party plugins or connectors	Includes pre-built but 3rd party also possible
<b>Appropriate Company Size</b>	Small to large	Medium to large	Medium to large	Medium to Large
<b>Custom Visualization</b>	Yes	Yes	Yes	Yes
<b>Data Discovery</b>	Yes	Yes	Yes	Yes
<b>Pricing</b>	Free trial	Free trial	Free trial	Free trial
	Power BI Pro: 9.40€ per month	Tableau creator: 75€ per month	Standard: 825€ per month	Lite plan: €79 per month
	Power BI Premium: 18.70€ per month	Tableau Explorer: 42 € per month	Premium: 2.700€ per month	Premium plan: €169 per month
	Power BI Embedded: Variable	Tableau Viewer: 15€ per month	Enterprise: Personalized quote	Enterprise plan: Customized price for special requirements
<b>Focus</b>	Integration with the Microsoft Ecosystem Self-Service BI for individuals and small teams	Advanced viewing, exploratory Analysis and flexibility and customization for individuals and teams	Associative analysis exploration and analysis for teams and enterprises Data Integration, allowing users to load, transform and model data for analysis Visualization and Dashboarding	-Identify companies, that visited the website by IP address. -Analysing visitor behaviour on website. -Sales teams can prioritize outreach to high-value leads based on firmographic data and website behavior.
<b>Data Analysis</b>	Solid for basic analysis and reporting	Excels in interactive visualizations and advanced exploratory analysis	Thrives on uncovering hidden connections and patterns within your data	Visitor behaviour analyses, Lead scoring, Reporting and analytics, Integration with external data source
<b>Data Visualization</b>	Create custom dashboards with key metrics	It offers highly interactive and dynamic visualizations	Allows you to create personalized and intuitive visualizations	Offers basic visualisation tools, can be integrated with external visualisation tools

Source: Own Elaboration(2024)

After systematic comparison of the available tools with the pre-established criteria, we have started the implementation of a systematic two-pronged strategy for the incorporation of AI features into our Microsoft Dynamics CRM footprint.

This is a strategic plan that aims to advance the way we handle the relationships with our customers and follow a plan that will help the business to grow.

## 5.5. Part 1: Quality Verification Methods

The objective of the first part is to ensure the quality of the data in the CRM system by identifying and dealing with incomplete or erroneous records. This is achieved through a two-pronged approach. Furthermore, data management can be described as data enrichment and integration.

Data Enrichment: The data collected from outside the CRM system will be integrated to enhance the existing customer-related information present in the system. These sources may include Solar Energy Industry Databases, Business Directories and Commercial Databases, Professional Networks and License and Certification Records.

Data Integration: To integrate the data and obtain the missing information the data needs to get extracted first by using tools, such as web scraping which facilitate the integration into the CRM of the company. This eradicates the concern of information gaps. The following analysis demonstrates how this was achieved.

Thus, data quality and data completeness addressed through data enrichment and integration lay the right starting point for the subsequent Phase 3 of the project, where the implementation of various AI functionalities will be achieved.

### ***5.5.1. Data Collection and Initial Filtering***

*Automate Data Collection:* To create a strong lead generation, we plan on using Leadfeeder, which is a website visitor tracking tool, to acquire the information. With the help of this tool, we will be able to feed fresh leads into our existing Microsoft Dynamics 365 CRM in a seamless manner and filter out irrelevant leads at the initial stages. Leadfeeder tracks website visitors who interact with our digital content, capturing valuable information like.

It captures information like contact detail, when it is available, such as email address, phone number, etc. but also website engagement metrics, such as pages visited, time spent on site and other behavioral insights.

This raw data for the leads is the kind of data that is processed by Leadfeeder. All this information can be analyzed, and the website can get deeper insights on visitor behavior. Contact information thus obtained and their interactions with us are automatically passed to and incorporated into our CRM database. This produces a resource for prospective customers who have already shown interest in our website as a first point of contact. This enhanced data is the basis for subsequent lead nurture and targeting efforts in subsequent stages of the campaign.

*Initial Filtering:* The captured data is then fed into the CRM, whereas certain fields will be excluded or added in defining the leads qualifying system.

These filters can target several factors:

**Table 36***Targeting filters and outcome*

<b>Targeted factor</b>	<b>Outcome</b>
Installation volume	Focusing on installers with a high volume of completed solar installations
Geographical location	Targeting leads within our designated sales regions
Engagement metrics	Prioritizing leads who demonstrate high engagement on relevant website content

Source: Own Elaboration(2024)

The initial stage of the process serves to identify and eliminate contacts that are unlikely to be potential buyers. This results in the creation of a list of prospects that may include the leads we seek, based on our pre-selected requirements. The outlook for this refined list is that it will be subject to leading nurturing and the subsequent first phase of targeted outreach in subsequent phases.

### ***5.5.2. Scoring and Classification***

Expanding upon the refined list of possible leads identified in Part 1, we shall integrate a lead scoring and classification system in our chosen CRM to set the base for prioritizing further communication and personalizing our approaches based on different classifications.

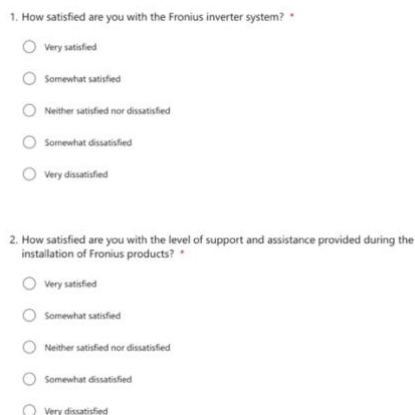
Lead Scoring with AI: This will be achieved through the utilization of data visualization tools, such as Power BI, Tableau or Qlik Sense, to construct a scoring algorithm. The algorithm will investigate the CRM data that has been filtered. It will examine the following details: installation volume, product portfolio, previous interaction with the company, and geography. The relative importance of each criterion will be determined based on its relevance to the business objectives. For example, there may be a tendency for installation volume to be more important than geographic coverage.

Subsequently, the AI capabilities of these tools will be employed to generate a score for each installer, based on the weighted criteria. This will result in an estimate of the quantity, which may be referred to as the ‘installer score’. This score may be used to measure the likely value of an installer.

This information is extracted from a installers feedback survey:

## Figure 11

### *Survey Question 1 and 2*



1. How satisfied are you with the Fronius inverter system? \*

Very satisfied

Somewhat satisfied

Neither satisfied nor dissatisfied

Somewhat dissatisfied

Very dissatisfied

2. How satisfied are you with the level of support and assistance provided during the installation of Fronius products? \*

Very satisfied

Somewhat satisfied

Neither satisfied nor dissatisfied

Somewhat dissatisfied

Very dissatisfied

Source: Own Elaboration(2024)

**Figure 12***Survey Question 3 and 4*

3. What additional support or resources could we provide to ensure that you recommend Fronius products and services to other installers? \*
- Incentives
  - Discounts
  - Certification
  - Training programs
  - Networking events
  - Other
4. How many Fronius systems did you install throughout the past year in kW? \*
- Other

Source: Own Elaboration(2024)

**Figure 13***Survey Question 5 and 6*

5. Compared to other brands, what percentage of your installations were Fronius products? \*
- 0-20%
  - 20-40%
  - 40-60%
  - 60-80%
  - 80-100%
6. How would you rate the overall value for money of Fronius products in relation to the installation experience? \*
- Definitely better than competitive products
  - Rather better than competitive products
  - Same as competitive products
  - Worse than competitive products

Source: Own Elaboration(2024)

## Figure 14

### *Survey Question 7 and 8*

7. How often do you encounter technical issues with Fronius products during installations? \*

Never encounter issues with Fronius products

Rarely encounter issues with Fronius products

Sometimes encounter issues with Fronius products

Very often encounter issues with Fronius products

Always encounter issues with Fronius products

8. What recognition or rewards for your efforts would strengthen your loyalty to our brand? \*

Incentives

VIP Events

Special offers

Other

Source: Own Elaboration(2024)

*Classification for Targeted Engagement:* The installer engagement is categorized according to the above-scored results, with the installers automatically placed in different performance tiers in the CRM. Those at the top of the score are placed in Tier A, which is reserved for those with the greatest potential for growth. Those with lower scores are placed in Tier F, which is reserved for those who are not of high use soon. Consequently, the implementation of an automated classification process ensures the consistency of the lead processing, thereby rendering this method highly effective. It is insightful to prioritize the targets because this means the subjects that have been categorized are already pre-tested and shown to be receptive to approaches that deal with structured categorization. The higher the level of the installation, the higher the likelihood that you will need to pay more attention and use high-level engagement strategies to target installers in tiers A and B, for instance, while those in tiers D and

F can be targeted with low-level engagement campaigns. I consider the digital approach to have a significant advantage here since it enables one to filter and focus on the most valuable and potentially profitable endeavors.

### *5.5.3. Quality Verification*

To minimize unnecessary errors in the installer data, which are crucial for our analysis, we will use the built-in integration between the Microsoft Dynamics 365 CRM and third-party data validation services. This is intended to eliminate or reduce any discrepancies or incomplete data that may be encountered during the compilation or acquisition of data for a study or research project.

*Automated Data Verification:* Microsoft Power Automate (or Flow) will be employed to easily manage and automate connections with external data verification service APIs and Webservices. Such services can include common databases such as Dun & Bradstreet (D&B), hoovers, and Clearbit.

*Integration Methods:* There are two main integration methods that will be employed. First, we have the Native Dynamics 365 Connectors. In this instance we will utilize the pre-existing dynamics 365 connectors that are specific to the given services, such as the LinkedIn connection. These connectors facilitate integration and reduce the frequency of data exchange between the CRM and other data sources.

The second method is that of custom API integrations. If no native connectors exist within the services, we will create connectors using APIs with the objective of integrating data verification services. Such integrations are highly flexible, allowing for the development of bespoke verification procedures and the confirmation of data integrity.

*Dynamics 365 Web API:* The Dynamics 365 Web API is a REST based environment that plays the role of a web service, so that, you can use HTTP commands to put pressure on your data handling Dynamics 365 applications. This makes it easy to implement Dynamics 365's ability to connect and function with other systems and applications. Key features of the Web API include:

- **CRUD (Create, Read, Update, Delete) Operations:** The web API enables basic data manipulation of the Dynamics 365 records like, write new records, read records, update records and delete records.
- **Batch Requests:** Batch calls The Web API supports batch operations where multiple operations can be made in a single HTTP command. This can enhance efficiency and speed, specifically for large-scale edits of the datum or other related information.
- **Using OData (Open Data Protocol):** The Web API employs OData as its query interface which follows a standard on querying and updating data. This also offers an easy way to construct complex query queries to obtain specific data all of which make this type of database ideal for use in business.

*Custom APIs:* Dynamics 365 puts it within developers' hands to create their custom operations. This functionality enables creating specific actions that can be launched through Web API. Furthermore, the developer also has options to design specific message processing steps,

which makes them even more flexible on the things they desire to do with the data when it comes to Dynamics 365.

The links will be applied by the CRM system to cross-verify and validate the installer data from the respective external databases. This stage entails the comparison of data, such as the installer's details, contact information, and business details to authenticate the details.

The outcome of the verification process is a dataset which has already detected errors or inconsistencies, and such errors or inconsistencies are corrected. The objective is to ensure that the information stored in the CRM about the installers is accurate and up to date. This will help to avoid potential communication and engagement issues in the future. It is crucial to recognize that an emphasis on data quality enables us to act based on knowledge, thereby fostering more robust relations with the installer base.

## 5.6. Part 2: Maximizing Campaign Focus and Follow-Up

### 5.6.1. Actionable Insights and Follow-Up

Using the data that will be obtained in Step 2 for lead scoring and classification and the data that will be verified in Step 3, we will undertake several strategies of nurturing and follow-up for higher Chips installers.

Prioritized Task Generation: As mentioned, depending on the installer classification in the CRM (A-F), the task to sell the solar systems will be automatically created for the members of the sales team. These prioritized tasks will make it possible to focus more on high value installers (A and B) first in the regimen of outreach efforts. It includes tasks of prioritizing direct sales calls to customers, or visits and other things like individual telephone calls or emails.

Automated Engagement Strategies: To achieve a wider reach, broader based marketing will use Microsoft Dynamics 365 Marketing which is developed to work with Dynamics 365. This tool offers robust automated marketing functionalities that will be tailored based on installer classification.

Segmented email marketing: In the framework of Dynamics 365 Marketing, we will be able to generate specific emails to subscribers based on a segment of interest. General content will be blocked according to an installer's classification to guarantee that they are subjected to contents that forward their specific requirements. For example, privately dealing installers (A &

B) may get individual offers, which emphasize how the products are helpful, whereas Indie/Rising installers (D and F) could get generic informative newsletters.

*Content personalization:* In addition, in Dynamics 365 Marketing, there is also the possibility of content customization for the components used in these letters, which will undoubtedly make the use of these tools even more effective. It is possible to use some kind of local variable to name it and personalize it according to the specific challenges or opportunities put for each segment of the installers.

*Automated Campaign Delivery:* These are usually targeted campaigns informed by triggers and or time intervals which can also be automatically generated. This makes sure that it gets to their doors on time and makes the direct call-out process easier at the same time, saving our sales team a lot of time to engage new top of the funnel prospects.

*Performance Tracking and Optimization:* Finally, Dynamics 365 Marketing offers complete dashboard metrics and analytics related to marketing campaigns. This enables us to track the engagement trends and the specific performance of the specific techniques we use in the automated marketing communication to make the necessary adjustments.

With the help of prioritized tasks generation and using the methods of tee-and-pique work, it is possible to increase interest from the potential clients, develop relations with them, and turn the interested installers into valuable partners.

*Dynamics 365 CRM:* Dynamics 365 can integrate with third-party lead acquisition services to query and enrich the new leads and prioritise high-potential prospects by using AI for lead scoring, qualifying. Engages leads via email, SMS, and LinkedIn, and with unified tools, sales and marketing can work together smoothly and make sure no leads are missing out.

*AI and Copilot Features:* MS Dynamics 365 uses AI generated email responses and summarising skills to handle the customer communication and follow-ups. Examine client's communication and sales conversations to offer insight and recommendation that may be put into practice

Dynamics 365 creates personalised customer journey by creating tailored experiences across multiple channels, based on the customer behaviour, and preferences. This approach ensures that each customer feels valued and understood, leading to a stronger relationship. Comprehensive dashboard and reporting tools provide actionable insight into campaign performance, customer interactions and lead quality. With the automation features MS Dynamics can focus on more strategic initiatives. The tool also provides seamless integration with other MS Dynamics applications, such as Sales and Customer Service, and offers a unified view of customer data.

### **Pricing:**

Plans and benefits of the Dynamics 365 Sales (*Sales Pricing, 2024*):

**Table 37***Dynamics 365 Sales plans and benefits*

<b>Free</b>		<b>Paid</b>		
Dynamics 365 Sales (free trial)	Professional (\$65/month)	Enterprise (\$95/month)	Premium (\$135/month)	Relationship Sales (Variable)
Plan includes: - Help your sales team stay focused, boost productivity, and build customer trust	Plan includes: - Core sales force automation, Microsoft 365 interoperability, reporting, and dashboards	Plan includes: - Industry-leading sales force automation with contextual insights, AI, and advanced customization - Includes Copilot in Dynamics 365 Sales capabilities such as: ○ Natural language insights ○ Record updates ○ Email and meeting assistance ○	Plan includes: - Dynamics 365 Sales Enterprise plus prebuilt customizable intelligence solutions for sellers and managers - Includes Copilot capabilities such as: ○ Natural language insights ○ Record updates ○ Email and meeting assistance ○ O ppportun	Plan includes: - Dynamics 365 Sales Enterprise plus LinkedIn Sales Navigator - Requires a 10-seat minimum

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Source: Own Elaboration(2024)

Dynamics 365 Marketing: Starts at \$1,500 per tenant/month, with additional charges based on contact and interaction volumes.

### ***5.6.2. Continuous Improvement***

To conduct research on the application of lead generation, it is essential to implement an effective method of continuous monitoring and internal enhancement of the lead generation system. This process shall be ongoing, with the use of analytical tools and customer relationship data to refine the scores and engagement within the CRM.

Performance Reporting and Insights: The outcome of this monitoring will then be captured in broader performance reports. As such, these reports will give the company an opportunity to understand the impact of the marketing campaigns, the customers' experience, and the proportion of the visitors who eventually become the customers. They will embrace strengths as well as areas for growth and development within the organizational setting. By knowing which installer segments are sensitive to certain outreach strategies, we can draw upon

this quantitative information to inform which outreach strategies are most effective in which installer segments.

*Continuous Refinement and Optimization:* Following the insights obtained from such reports, it will be possible to make constant improvements to the scoring model and the engagement approaches. This may involve several actions.

*Adjusting Scoring Weights:* Inserting the weights that correlate with the criteria used to issue scores for installers and readjusting some elements to better respond to the scoring model requirements may be potential

*Adding New Criteria:* More parts of the scoring model can be developed from newly incorporated data points or criteria as significant new indicators of installer quality are ascertained.

*Enhancing Data Collection Methods:* We may investigate ways of sourcing broader or more precise information inputs to be fed into the scoring model in the future.

*Refining Segmentation Strategies:* It is possible to analyze further an experimental criterion of segmentation employed in e-mail marketing for better positioning of the installer segments to receive the most pertinent messages.

*Optimizing Engagement Tactics:* We may open one or another of the engagement tactics employed depending on the tier of the installer that is in question A-F. For instance, the preferred action plan to use in the follow-up strategy may be appropriate for high priority prospects- A & B where a more personalized approach is used.

Through performance tracking, analysis, and optimization, we can be highly confident that our lead generation strategy is working as it should to consistently deliver the best results to warrant the investment put into it.

## 6. Conclusion

In this comprehensive report, we undertook a detailed research process to achieve several crucial objectives essential for enhancing Fortech' operational efficiency and data management capabilities. The primary objectives included identifying relevant additional data necessary for effective lead qualification, determining the optimal processes for obtaining this data, and identifying robust quality verification methods. Additionally, we sought to develop appropriate solutions to fulfill these requirements, ensuring that Fortech can implement a streamlined and efficient workflow.

Our research methodology involved a thorough investigation into the most effective AI tools, as well as quality verification methods for their automation. We evaluated a range of AI technologies and solutions, considering their applicability, efficiency, and integration capabilities within Fortech' existing systems. This analysis enabled us to draw informed conclusions about the best tools and methods to meet the company's needs.

Moreover, based on our findings, we formulated practical recommendations for the usage of these suggested tools to fulfill the objectives of the report. These recommendations include detailed guidance on the sequence of usage to maximize their effectiveness and ensure a seamless integration into Fortech' workflow. Our proposed solutions are designed to optimize data acquisition, processing, and verification processes, thereby enhancing the overall quality and reliability of lead qualification data and lead verification methods.

In conclusion, we are confident that the implementation of our recommendations will enable Fortech to cover the specified objectives comprehensively. The proposed solutions aim to

create a fully automated workflow, which will not only streamline operations but also improve the accuracy and efficiency of data management. By adopting recommendations and automation methods, Fortech can achieve a significant competitive advantage, driving innovation and operational excellence.

## 7. Recommendation

### 7.1. AI Tools

The objective of the first criterion “Lead Generation and Prospecting Tools” is to find and collect potential customer information. Our recommendation is the tool “UpLead”. It provides access to a database of verified business contacts, including emails and phone numbers, which is essential for lead generation. Furthermore, it offers lead scoring based on potential fit, helping prioritize outreach efforts. Most importantly, it integrates well with existing CRM systems, ensuring smooth data flow and compatibility.

The goal of the second criteria “Sales Intelligence and CRM tools” is to provide insights and automation to enhance sales processes. Based on our evaluation the most beneficial tool to implement in this aspect is Octopuscrm.io. This tool integrates seamlessly with other corporate tools, enhancing the workflow by allowing easy data transfer and communication between different platform used by the company. Furthermore, it offers various customization options to meet the specific needs of Fortech. All the features of Octopuscrm.io can enhance productivity, streamline workflows, and improve lead management.

Marketing automation and customer engagement tools assist in automating marketing tasks and customer engagement. In the aspect of marketing automation and customer engagement MadKudu would be clearly beneficial for Fortech to implement. It allows for seamless integration with other CRM systems. MadKudu offers various customer segmentation capabilities, tailoring marketing efforts to specific segments for higher engagement and conversion rates.

API and integration tools offer APIs for custom integration in other system. The best scoring in this category has Emarsys. This tool excels in tailoring cross-channel consumer engagement, crucial for a unified customer experience. It combines data, such as sales, product and customer data, to provide actionable insights from a single source, enhancing marketers' capacity to act and positively impacting business results.

The last criteria is miscellaneous which focuses on tools that do not fit into the other criterions. The most beneficial out of the selected tools would be Google Alerts, as it is a highly beneficial tool for monitoring the web for specific keywords and topics relevant to the business. It provides timely notifications about mentions of the company, competitors or industry trends, allowing the company to stay informed and responsive. Moreover, as it is free to use, it is very cost-effective.

## **7.2. *Web Scraping***

After the rating and careful consideration, we would recommend Fortech to either try out or work with one of the following web scraper providers:

1. Data Miner got the highest grade with 24 out of 30 points.
2. Octoparse got the second highest grade with 22 points.
3. Mozenda got 20 points as did a few other web scrapers, therefore it is our personal preference to recommend it instead of the others.

Data Miner, Octoparse and Mozenda are great web scrapers for testing and data enrichment. They have free trials and are easy to use. Data Miner has a browser extension for data extraction, Octoparse has a point-and-click tool for beginners and advanced users, and Mozenda has cloud-based scraping with scalable options. These tools help users to collect the web data that they need.

### **7.3. Quality Verification Methods**

In data collection and initial filtering, we suggest using Leadfeeder together with primary lead collection and sorting techniques. This mix is meaningful and powerful since it provides a multi-step strategy that covers lead generation, lead scrutiny, and lead cultivation.

As for Leadfeeder, it has special success in identifying the website visitors who show more interest in the content. At the same time, it supplements lead data with useful information: company e-mail and phone number if any; website traffic data such as number of viewed pages and time spent on the site. This rich information is integrated and synchronized into your existing CRM software eliminating the manual process of entering the same information repeatedly.

In scoring and classification, we suggest using a Power BI since it works well with Fortech' CRM Microsoft Dynamics 365. By doing this, filtered lead data can be accessed and managed effectively in Power BI without submitting requests through various intermediary steps which can be time-consuming and involve higher chances of errors. Also, it has good visual presentations of data as well as graphical representations like graphs and diagrams. Such charts

and graphs are utilized to search out additional opportunities or concealed patterns within lead information to facilitate selection of key criteria in further lead qualification (for instance, install volume against geographical location). It is also possible to prioritize various attributes of a lead, such as install volume, as more important or less important in comparison to others and come up with an installer score to reflect this, where numerical values are assigned to the criteria. This is particularly useful in judging the possible value of each lead to ascertain the most appropriate method of approach. Additionally, the software enables one to work on specific dashboards and reports. You can use dashboards whereby you can include the leads' scores and even other information that is related to the lead, this will help in the sorting and rating of the leads according to the ranges of scores. This enables one to make effective decisions and give specific touch on the communication tactics for every lead segment.

And in quality verification, we suggest using Web API. Integration between Dynamics 365 CRM and Power BI is done seamlessly by the API, meaning there will be no need to manually export and import data to qualify leads while making certain that the data used is up to date and accurate. Also, it allows for operation using the CRUD rest interface to add to the lead data and modify the classification statuses, along with batch requests to handle many updates at a time. It also utilizes OData for standard web access to data and enables extended operations so that the developer of the API can define specific operations for the detailed qualification of leads.

Finally, for the improvement of the lead nurturing and follow-up process for Fortech, we suggest integrating with Microsoft 365 Marketing. There is the option for creating different segments of leads for the email campaigns to be sent out and setting up the list of email campaigns for certain leads; Certain campaigns can be set up as automatic to be executed at predefined intervals, the results of the campaigns are then measured and analyzed to gauge the

effectiveness of the marketing With Microsoft 365 Marketing, Fortech has the chance and the means of enhancing and fine-tuning the follow-up to the leads, raising installers' activity, improving firm connections and turning the good prospects into valuable partners.

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[illegal/#:~:text=While%20web%20scraping%20is%20not,website%20may%20be%20deemed%20illegal.](https://www.imperva.com/blog/is-web-scraping-illegal/#:~:text=While%20web%20scraping%20is%20not,website%20may%20be%20deemed%20illegal.)

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[scraping/#:~:text=Web%20scraping%20refers%20to%20the,the%20web%20to%20in](https://kinsta.com/knowledgebase/what-is-web-scraping/#:~:text=Web%20scraping%20refers%20to%20the,the%20web%20to%20in)  
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[alerts/#:~:text=Google%20Alerts%20is%20Free,no%20catches%20or%20hidden%20costs..](https://mention.com/en/blog/how-to-set-up-google-alerts/#:~:text=Google%20Alerts%20is%20Free,no%20catches%20or%20hidden%20costs..)

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## 9. Appendix

### 9.1. Project Sheet

**Description of Project:** Optimizing the lead identification process and qualify leads

**Company Name:** Fortech International

**Project Topic:** Effective lead qualification

**Some Facts:**

Topic	Effective lead qualification	Company Partner:	Fortech International
Topics	Effective lead qualification; optimize lead qualification process; quality verification process	Department:	Sales Department, Sustainability (Solar Energy)
Professor	FH.Prof.Dr. Kwiatek Piotr	Contact Person at Company:	Baczyk Natalia Rieder Markus
Course	GSM Bachelor CPR		
Kick-off-meeting	7 <sup>th</sup> of March 2024	Address:	Fortechplatz 1 4600 Wels

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Project close-down	27 <sup>th</sup> June 2024	Industry/ Business	Solar Energy
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Unit:

**Short Description:**

The main goal of our project is to identify relevant additional data for lead qualification, find the optimal process for obtaining the data on the leads and to identify the quality verification method.

**Some more information:**

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Project phases, activities	Kick off – Meeting, interim Presentation/ report, final presentation
Project documentation	Presentations, interim report and final report (in English)
Project team	Banai Zsombor, Cordoba Camilla, Haugberger Barbara, Heindl Sophia, Shulhai Valentyna, Winkler Leoni

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**Project Team Members:**

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No.	Name	No.	Name
1	Banai Zsombor	2	Cordoba Camilla
3	Haugberger Barbara	4	Heindl Sophia Marie
5	Shulhai Valentyna	6	Winkler Leoni

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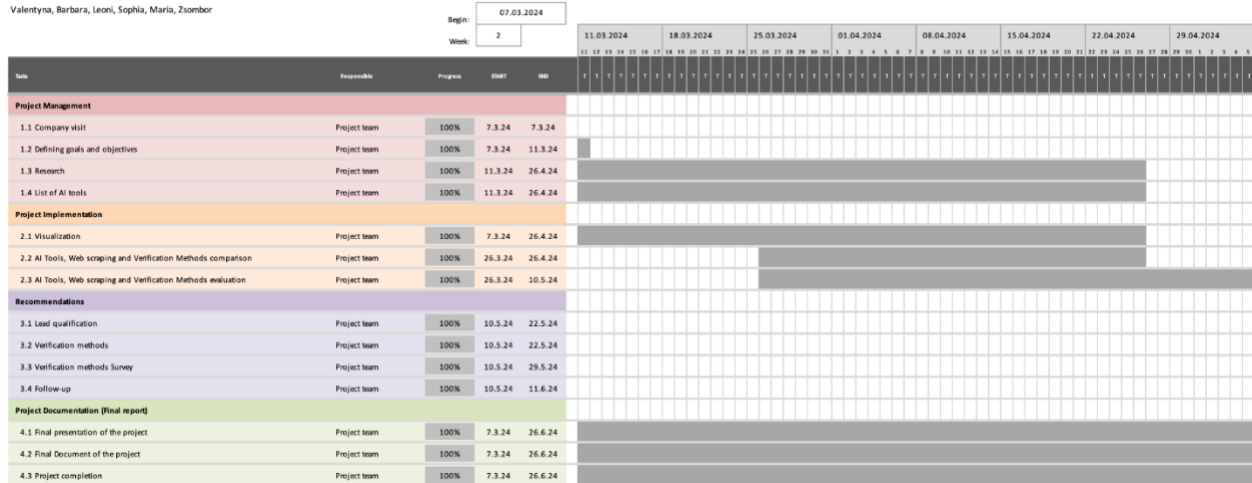
## 9.2. Ideal Customer Profile

<b>Criteria</b>	<b>Description</b>
Industry Segment	Solar Energy
Geographic Location	Regions with high solar energy potential and active construction or renovation markets
Company Size	Small to medium-sized businesses
Tech Adoption	Technologically savvy, open to adopting advanced solar energy solutions and tools for installation and monitoring
Budget	Allocates budget for purchasing high-quality Fortech inverters
Sustainability Commitment	Committed to promoting renewable energy and offering sustainable solutions to end customers
Previous Fortech Installation	Demonstrates a track record of successful Fortech inverters installations for various clients
Regulatory Environment	Operates in regions with supportive policies and incentives for solar energy adoption, aware of local regulations
Future Growth Potential	Positioned for growth as solar energy adoption continues to rise, expanding into new markets and services

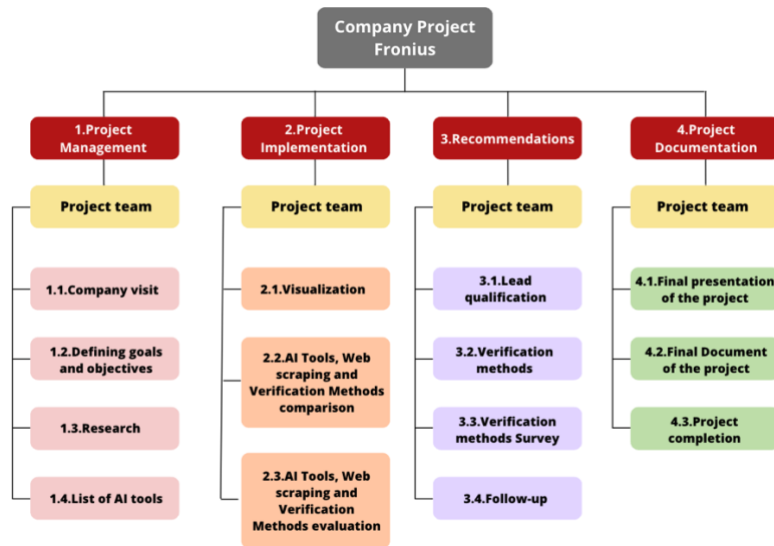
### 9.3. Gantt Chart

Company Project: Fronius

Valentyna, Barbara, Leoni, Sophia, Maria, Zsombor



### 9.4. Project Structure Plan



## 9.5. Milestone table

Date	Attendees	Topic	Outcomes
07.03.2024	Team members, Supervisor Kwiatek Piotr, Natalia Baczyk, Markus Rieder	Kick-Off meeting	<ul style="list-style-type: none"> <li>- Clarifications of the needs of the company</li> <li>- Understanding the Fortech activities, products and services</li> <li>- Establishments of roles</li> <li>- Establishments of deliverables from the company's side (list of installers, lead description &amp; qualification)</li> <li>- Definition of the objectives</li> <li>- Agreement on communication channels</li> </ul>
14.03.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with supervisor	<ul style="list-style-type: none"> <li>- Brainstorming</li> <li>- Plan development</li> <li>- Seeking solutions and evaluating ideas</li> <li>- Team charter created</li> </ul>

			<ul style="list-style-type: none"> <li>- Work on a shared document/report</li> </ul>
20.03.2024	Team members	Internal meeting within the group	<ul style="list-style-type: none"> <li>- Qualification and Classification solutions</li> <li>- Seeking for the solutions for the defined objectives</li> </ul>
26.03.2024	Team members, Supervisor Kwiatek Piotr, Natalia Baczyk	External meeting with the company	<ul style="list-style-type: none"> <li>- Understanding of the presentation delivery</li> <li>- Sharing of the ideas</li> </ul>
03.04.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with supervisor	<ul style="list-style-type: none"> <li>- Gantt Chart creation</li> <li>- Preparation of the presentation</li> <li>- Explanations of the found information</li> <li>- Suggestions for the improvement</li> <li>- Excel sheet created</li> <li>- Report improvement</li> <li>- Brainstorm on comparison of AI tools</li> </ul>

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			<ul style="list-style-type: none"><li>- Evaluation of the presentation</li><li>- Remarks for the improvement</li><li>- Adding explanation to the existing data</li></ul>
11.04.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with supervisor	<ul style="list-style-type: none"><li>- Drawing of the path of our approaches</li><li>- Sending the first presentation</li><li>- Necessary Additional data defined for the enriching AI tools</li><li>- Quality Verification Methods identified</li></ul>
18.04.2024	Team members, Supervisor Kwiatek Piotr, Natalia Baczyk	External meeting with the company, Status Update Meeting №1	<ul style="list-style-type: none"><li>- Feedback for the first presentation</li><li>- Differences between tools clarified</li><li>- Future steps for the recommendations</li><li>- Integration with Microsoft dynamics for our suggested tools defined</li></ul>

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02.05.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with the supervisor	<ul style="list-style-type: none"> <li>- Discussion on the further steps</li> <li>- Comparison of the AI tools</li> <li>- Web Scraping criteria for the comparison</li> <li>- Web scraping tools comparison</li> <li>- Comparison of the Verification methods</li> <li>- Necessary additional data coverage</li> <li>- Ideas for strategies and processes suggested</li> </ul>
10.05.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with the supervisor	<ul style="list-style-type: none"> <li>- Review of the presentation</li> <li>- Ideas for improvement</li> <li>- Clarification of the comparison</li> <li>- Improvement of the presentation</li> <li>- Work on the report</li> </ul>
15.05	Team members, Supervisor Kwiatek Piotr, Natalia Baczyk	External meeting with the company, Status Update Meeting №2	<ul style="list-style-type: none"> <li>- Feedback for the second presentation</li> <li>- Focus on the Installer Feedback survey</li> <li>- Evaluation of the reviewed AI tools suggested</li> </ul>

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			- Evaluation criteria defined
			- Evaluation table of the AI tools
			- Evaluation table for the Web Scraping
			- Sequence of work for the Verification Methods
	Team		- Survey created
22.05.2024	members,	Internal Meeting	- Short recommendation on the
	Supervisor	with the supervisor	AI tools created
	Kwiatek Piotr		- Short recommendation on the web scraping tools
			- Short recommendation on the Verification tools created
			- Work on the report

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			- Feedback on the third presentation
	Team		- Discussion on the final presentation
29.05.2024	members,	External meeting	- Explanation on the data extracted from the survey
	Supervisor	with the company,	- Short recommendation evaluation
	Kwiatek Piotr,	Status Update	
	Natalia	Meeting №3	
	Baczyk		

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11.06.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with the supervisor	<ul style="list-style-type: none"> <li>- Preparation on the final preparation</li> <li>- Review of the final report</li> <li>- Final presentation suggestions for the improvements</li> </ul>
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19.06.2024	Team members, Supervisor Kwiatek Piotr	Internal meeting with the supervisor	<ul style="list-style-type: none"> <li>- Presentation rehearsal</li> <li>- Minor improvements of the final report</li> <li>- Minor improvements of the final presentation</li> </ul>
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26.06.2024	Team members, Supervisor Kwiatek Piotr, Natalia Baczyk, Sabine Stockinger	External meeting with the company, Final presentation	<ul style="list-style-type: none"> <li>- Final presentation</li> <li>- Delivery of the final report</li> <li>- Delivery of the final presentation</li> </ul>

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