



Lead Management Overview - Check List for Learning Path

1 Housekeeping

- ☐ Create email signatures for quick follow ups - "Working on your quote now. I have a couple of quick questions that may save you money! I'll call shortly."
- ☐ Create text template - "Working on your quote now... few quick questions that may save you money. Calling shortly!"

2 Understanding Subject Line Follow Up Process - Open the Task Subject Line FU Process Spreadsheet

- ☐ Under the opportunity - Set a new follow up task- Use the subject line to organize the follow ups - Set the dates out as instructed in the Lead Process!
- ☐ A = Active pipeline - HOT - Add personal notes as needed - Example Great HH 4 Cars call after 4
- ☐ N = New Lead - Keep New Status until set out for renewal or its added to active pipe line
- ☐ R = Renewal - Set when worked as a renewal - Either active and not closed or new lead not contacted or sold
- ☐ C = Cold - Any Lead or prospect that has cycled through two renewal process with no contact made - Opportunity & Task Should be reassigned to a non selling TM or cold caller. If the x Dates have been added properly these prospects will show up in the xdate campaigns when their renewals come up

3 Internet Lead Process - Open the IL Process Spreadsheet

- The Internet Lead Process is broken down by day and steps!
- ☐ Day one has four steps - including email, text, calling B2B Quote - Set Task Follow up N2
- ☐ VERY IMPORTANT - When quoting click on previous insurance and add the renewal date, competitor, number if car to the "Quote" tab under the opportunity!
- ☐ Day - 2 N2 - Will trigger you are @ day 2 - Step 5- Calling B2B set to N3 to following day
- ☐ Day 3 - N3 - Will trigger you are on day 3 - Step 6 - Calling B2B set to N4 to the following day
- ☐ Day 4 - N4 - Call/Email/ Text - Hand written card (optional) - If no contact is made - Set out 45 day before the next renewal - Subject line = R - personal notes

4 Renewal Lead Process - Follow the Renewal Process FU Spreadsheet

5 New Customer Onboarding

- ☐ Closed won when there is an additional line of business to be sold - Adding the NCO to yourself and follow-up appropriately
- ☐ Closed won with no follow up - assign to office staff based on agent preference



Task Subject Line Follow Up Process	
A	Active Pipeline - HOT
N	New Status stays until set for renewal
R	Renewal follow up - Could be more than one renewal cycle
C	Real Person - Never Answered After 2 Renewal Cycles - Assign Opportunity & Sales Task to Non Sales TM

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New Internet Lead Process*

Step	Day	Activity
1	1	Check Salesforce if email is deliverable - If yes! Email Using Email Signature - Saving money starts today!
2	1	Text using template - Working on your quote - got some question about discounts - about to give you a call!
3	1	Call/Back2Back call if no answer!
		<u>BEFORE MOVING FORWARD</u> - if email is undeliverable and the number is bad - Request Credit - Delete Lead
4	1	Quote/ Red Envelope Quote w Personal Note / Send Gold Package Quote Sheet* See resources!
5	2	Call /Back2Back
6	3	Call/Back2Back
7	4	Call / Text/Email – Hand Written Post Card
		Set - Follow up - Sales Task - 45 days before X Date - Put R in Subject Line
		*X-Dates, Current Insurance Confirmed by customer or Previous Insurance Report
		<u>IMPORTANT</u> - Once contact is made and next steps layed out with prospect it becomes part of your active pipeline. In subjectline of the TASK it would show A- requested quote follow up via email or text.

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Closed Won Follow Up Process

1		<u>Review and Update Opportunity:</u>
		<i>Closed won! Is there still an opportunity for Life, Health.. Set out a follow up accordingly</i>
2		<u>Setup "New Customer Onboarding"</u>

<u>Renewal Process/Standard Lead Process*</u>		
Step	Day	Activity
1	1	Call / Email / Text
2	2	Call/Back2Back
3	3	Call / Text - Saving people money!!
		Set - Follow up - Sales Task - 45 days before X Date - Put R in Subject Line
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