



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!
		BEFORE MOVING FORWARD - 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
		IMPORTANT - 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.

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

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>