BEST PRACTICES:
RECOMMENDED LEAD MANAGER PROCESSES

Suggested Action Items for Agency Owner or Lead Process Owner:

Day One

- ☐ Turn on all the following workflows from the "Workflow" page:
    - Workflow: Move New Unassigned Leads that Cannot be Called or Emailed to Recycle Bin after 3 Days
    - Workflow: Cold Prospects
    - Workflow: Engaged or Warmed Prospects
    - Workflow: Highly Engaged Prospects - LAT, MWI, & Spreadsheets
    - Workflow: Highly Engaged Prospects - Web & Manually Added
- ☐ Assign each LSP 50 leads to work that day.
    - Start with the Highly Engaged Prospects first, then Engaged or Warmed.

Day Two

- ☐ Assign each LSP an additional 50 leads to work that day.

Day Three

- ☐ Check with each LSP to see how many follow up appointments they have for that day. If they have less than 50, assign them additional leads to bring them to 50 leads per day.
- ☐ Continue to check in with staff to keep them at 50 leads/follow ups.
- ☐ Repeat this process for the next three weeks.

After three weeks:

- ☐ Turn on the following workflow to begin auto assigning leads:
    - Workflow: Assign Contactable Allstate Leads & Spreadsheets

Suggested Action Items for LSPs

Day One

- ☐ Log into Lead Manager.
- ☐ Work your leads from top to bottom.
- ☐ Use the appropriate Milestone for each contact attempt depending upon the outcome of their phone call:
    - For example: Attempted Contact, Not Interested, Quoted or Appointment
    - Putting Milestones on the lead record will begin the automated workflows

Day Two

- ☐ Log into Lead Manager.
- ☐ Work your leads from top to bottom.
- ☐ Use the appropriate Milestone for each contact attempt depending upon the outcome of their phone call:
    - For example: Attempted Contact, Not Interested, Quoted or Appointment
    - Putting Milestones on the lead record will begin the automated workflows

Day Three and beyond

Updated as of 3/9/2020

Internal Information

☐ Log into Lead Manager.
☐ Look to see how many follow-ups you have scheduled for the day.
  - If you have less than 50 lead follow ups for the day, notify your agency owner or process owner that you need more leads.
☐ Work your new leads.
☐ Work your follow-up appointments.