

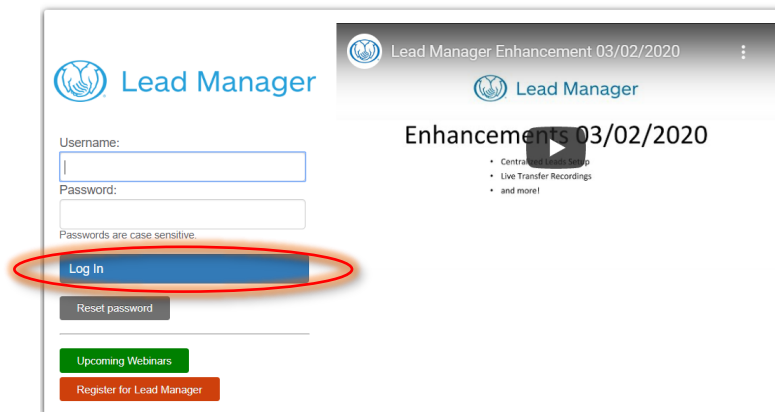
LEAD MANAGER: INTERNET LEADS & LIVE CALL TRANSFER FEEDBACK JOB AID

Details:

For those who enrolled in internet leads and/or live call transfers through the CLDP program, we want to hear your feedback! There is a new feedback form embedded in your Lead Manager platform to help us gather information to continue evolving these offerings.

Step by Step:

Log into Lead Manager



You can find leads in the Lead Spotlight section on the Home page. Navigate to CL Shopping, click the lead to begin working and if you have feedback, utilize the feedback button below:

Lead Spotlight	
CL Likely to Bind ?	2
CL Shopping ?	3
Trigger/Reason to Contact ?	6

Lead Search Results													Column Options	Compliance Options	+ Add New Lead	Refresh
	Name	Status	Source	Milestone	Assigned To User	Last History Author	Last History Date	Next Appointment	State/Province	Zip Code	Phone	Loaded				
<input type="checkbox"/>	Jenny Thomas CL Shopping	Highly Engaged	CL Growth Live Call Auto			0Z0005 0Z0005	5/5/2020 9:37:16 AM		Texas	76501	(254) 228-0384 OK	5/5/2020 9:37:15 AM				
<input type="checkbox"/>	Johnny Jackson CL Shopping	Highly Engaged	CL Growth Auto			0Z0005 0Z0005	5/5/2020 9:37:54 AM		Texas	76501	(254) 228-0384 OK	5/5/2020 9:37:54 AM				
<input type="checkbox"/>	Jack Johnson CL Shopping	Highly Engaged	CL Growth Home			0Z0005 0Z0005	5/5/2020 9:38:08 AM		Texas	76501	(254) 228-0384 OK	5/5/2020 9:38:07 AM				

Page size: 50 | 3 items in 1 pages

Lead Log

The lead is being scrubbed and scored.
The lead is currently unassigned. [Claim](#)

[Next Lead](#)

Created By 0Z0005
0Z0005
On May 05, 2020

Choose Quick Action

+ Add New Folder

Lead Contact Information
Jenny Thomas [CL Shopping](#)
CL Growth Live Call Auto
(254) 228-0384 (P) [OK](#)
madeleneriggins53@gmail.com
[OK](#)
No Current Basic Workflow
Highly Engaged

Special Note
No special note yet.

Details Activity (1) Opportunities (0) Files (0) Send Email Schedule (0) Engagement Basic Workflow (Off)

Details Jenny Thomas (Lead Id: 109032-)

First Name: Jenny
Middle Name:
Lead Source: CL Growth Live Call Auto
Address Line 1: 1301 N 12th St
Address Line 2:
Email Address: [OK](#) madeleneriggins53@gmail.com
Web Site:
Quoted Date:
ISM:
NTID:
Control Number:
 Has Multiple Vehicles
 Has Boat

[Provide Feedback](#)

If you do not see "CL Shopping" in your spotlight and you are eager to provide feedback, follow the below steps.

Leads ->Leads All->All

Lead Manager

Home Administration **Leads** Schedule Files My Account Resource Center Log Out

Account Overview **All** Cross-Sell Prospect Business

Unassigned Leads

Summary	Web Leads Days 1-14	0
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Assigned Leads **All**

	Highly Engaged	Engaged	Warmed
No Milestone	0	0	0
Attempting Contact	0	0	0

Navigation menu items: Shark Tank, Add New Lead, My Assigned Leads, **Leads - All**, Opportunities, Recycle Bin, Running Workflows, Call Logic Dialing Campaigns, Leads Removed Report

Sub-menu items: **All**, Web, Form, Imported, Manually Entered

Utilize the "Source" section to filter down to a lead that came from the Centralized Lead Distribution Program (Internet Leads or Live Call Transfers) and click into the lead record

Lead List	All	Cross-Sell	Prospect	Business	Column Options	Compliance Options	+ Add New Lead	Refresh			
<input type="checkbox"/>	Name	Status	Source	Assigned To	Last History Author	Last History Date	Next Appointment	State/Province	Zip Code	Phone	Loaded
<input type="checkbox"/>	JONATHAN WEEDMAN	Cold	MC Winba	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:06 AM		Colorado	80433	OK	4/6/2017 11:31:53 AM
<input type="checkbox"/>	MICHAEL BROOKS	Cold	MC Winba	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:07 AM		Colorado	80439		4/6/2017 11:32:03 AM
<input type="checkbox"/>	RICKARD STAM	Cold	MC Winba	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:07 AM		Colorado	80110		4/6/2017 11:32:13 AM
<input type="checkbox"/>	RONALD WISEMAN	Cold	MC Winba	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:07 AM		Colorado	81212		4/6/2017 11:32:36 AM
<input type="checkbox"/>	JAMES MARTINEZ	Cold	Renters Recontact	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:08 AM		Colorado	80113		4/6/2017 11:36:02 AM
<input type="checkbox"/>	BRENDA HAAS	Cold	Renters Recontact	Varsha Shivakumar	Varsha Shivakumar	2/18/2020 8:45:08 AM		Colorado	80620		4/6/2017 11:36:18 AM

Lead List	All	Cross-Sell	Prospect	Business	
<input type="checkbox"/>	Name	Status	Source	Milestone	Assigned To User
<input type="checkbox"/>	Arya Stark	Warmed	Centralized Internet Home		

Page size: 50

At the bottom left corner, you will see the button where you can provide feedback.

Lead Log

The lead is being scrubbed and scored.
The lead is currently unassigned. [Claim](#)

Created By 0Z0005
0Z0005
On Apr 10, 2020

Choose Quick Action

+ Add New Folder

Details Activity (3) Opportunities (0) Files (0) Send Email Schedule (0) Engagement Basic Workflow (Off)

Details Arya Stark (Lead Id: 108938-32494CA4-1BB9-48AD-886D-A228F672BE7C)


First Name: Arya	Lead Source: Centralized Internet Home	Email Address: jkhkjhjkhk@gmail.com	ISM:
Middle Name:	Address Line 1: 109 County Road 5	Web Site:	NTID:
Last Name: Stark	Address Line 2:	Quoted Date:	Control Number:
			<input type="checkbox"/> Has Multiple Vehicles
			<input type="checkbox"/> Has Boat

[Provide Feedback](#)

Lead Contact Information
Arya Stark
Centralized Internet Home
(949) 523-6985 (P)
jkhkjhjkhk@gmail.com
No Current Basic Workflow
Cold

Special Note
No special note yet.

Be sure to click “submit” so your feedback goes to the appropriate sources.

 Provide Feedback ✕

To inform future CLDP enhancements, please share your lead feedback here.

- Wrong number
- Disconnected number
- Fax Machine
- Consumer Did Not Request
- Consumer is already an insured with Allstate
- Duplicate Lead: Received this lead within last 30/60 days

Please add any additional feedback here

Submit Feedback

Cancel

We appreciate your feedback! As a reminder, there are no credits in CLDP. The feedback you provide will be considered in future CLDP enhancements.