Lead Manager

Job Aid – Getting Started

I) Activating your Account

1) After registration/education, the agency owner will receive an email with instructions for logging into the account. If you do not receive the email, please contact Lead Manager support at LeadManager@allstate.com.
2) To get started, go to www.AllstateLeadManager.com and click on reset password. Enter your Allstate agent ID and that agency id's email (e.g. A01111@allstate.com). You will be emailed a temporary password. After your first log in, you will be prompted to set up a new password.

II) My Company Page

1) Shark Tank

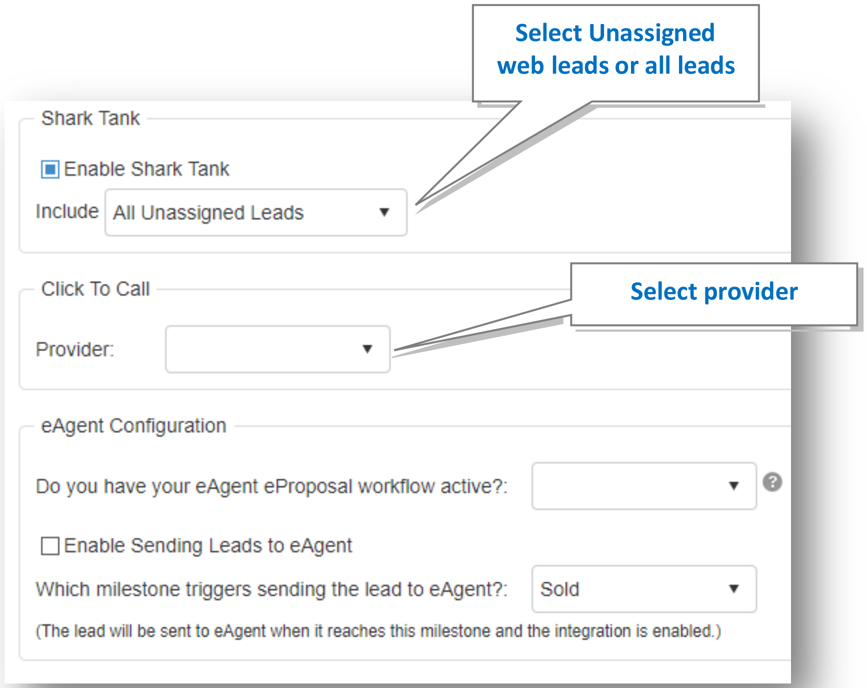
Shark Tank is a list of unassigned leads. This feature is generally used for agencies who would like to use pull distribution vs. auto assigning new leads. Users can claim leads from the Shark Tank, and assign the leads to themselves.

a) If you do not select an Auto Assign Group when configuring your web leads or web form leads, your leads will be unassigned, allowing them to appear in the Shark Tank.
b) To give your staff access to the Shark Tank, which is simply a list of new unassigned leads, first go to Administration > My Company and click "Enable Shark Tank" in the Shark Tank box on the right. Choose "All Unassigned Web Leads" in the dropdown, and click "Save."
c) The Shark Tank can now be found in the Leads tab.
d) If you would like this to be your users' landing page when they log into Lead Manager, they can edit this in My Account under the "On Login Go To" dropdown. Administrators can edit users' profiles in Administration > Manage Users by clicking the person icon next to the user's name.
e) If users would also like to receive an email and/or popup notification about all new web leads, go to My Account and select "Notify me of ALL new web leads" or " Notify me of ALL new web form leads " in the Auto-Assignment and New Lead Email Notification Settings section.

2) Click To Call

If your agency is working with a VOIP provider you can integrate them with Lead Manager to enable to click to call functionality

a) Click the drop down right of the Provider in the Click To Call section and select your provider.
b) Enable the Click to Call plugin and if you have Lightspeed you can enable the Hot lead call as well.
c) Let your staff members know they can now navigate to My Account Tab and update the Click to Call Settings.



3) eAgent

There are 2 setting available to you in the eAgent Configuration settings.

a) If you have your eProposal workflows active in eAgent you will most likely move to eAgent to follow up on a lead after quoted. If don't have these workflows active you may stay in Lead Manager until you bind the lead. You can tell the system if you have your eProposal workflows active, so it makes the right decision for you
   (1) If you leave it blank, you will see a pop-up each time a lead is marked quoted asking if you want to keep working this lead in Lead Manager or work in eAgent
   (2) If you select 'Yes', your leads will be automatically pushed to the recycle bin when marked quoted.
   (3) If you select 'No', you will continue working quoted leads in Lead Manager.

b) eAgent configuration allows agencies to choose at which milestone a lead should move from Lead Manager into eAgent.
   (1) We recommend agencies keep this integration off because Alliance will pass a lead when bound or at personalized proposals to eAgent automatically, keeping this integration off will help avoid duplication in eAgent.
   (2) If you do choose to enable this feature, use the drop down to pick the milestone you would like leads to move to eAgent. NOTE: only the last note and disposition will move to eAgent

III) Setting Up Users

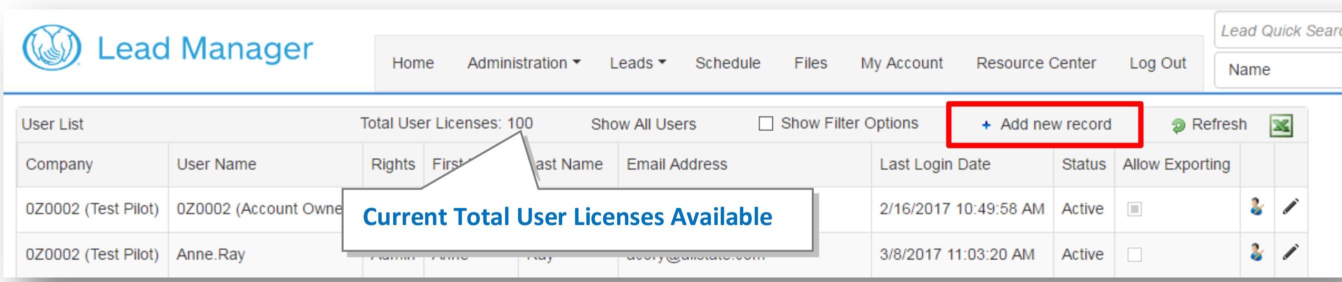
1) Creating Usernames

When you log into your Lead Manager account for the first time, a username will already have been created for the agency owner. The username will be the agency owner's agent ID.

Note: If an agent has multiple agent IDs, the primary agent ID will be used.

To add each additional user, navigate to Administration > Manage Users, and follow the steps below:

a) Click +Add New Record
b) Enter the user's information and click "Save"
c) The agency owner is responsible for providing each user with their username and password



2) Purchasing Additional User Licenses (Seats)

If your agency would like more licenses using the tool, you are able to purchase additional licenses. To add additional licenses:

a) Navigate to Administration > Subscription.
b) Select "Increase User Licenses"
c) Click the up arrow to calculate the charge. The new licenses will be prorated for the number of days left in your billing package.

Note: Only an Account Owner can add additional licenses. If you are unsure who the Account Owner is, navigate to Administration > Manage Users. The Account Owner will be specified there. To grant Account Owner privileges to an additional user, contact Lead Manager support.

IV) Assigning Leads

1) Setting up Auto Assign Groups

a) To set up an auto-assign group navigate to the admin tab and click “Auto Assign Groups”
b) To create a new group click “Add new record”
c) Create a group name and click the black check mark
d) To add users to the group click on “No users added yet,” select the users you want to add and click the black check mark to save
e) Click the Save Users button

2) Assigning leads by source

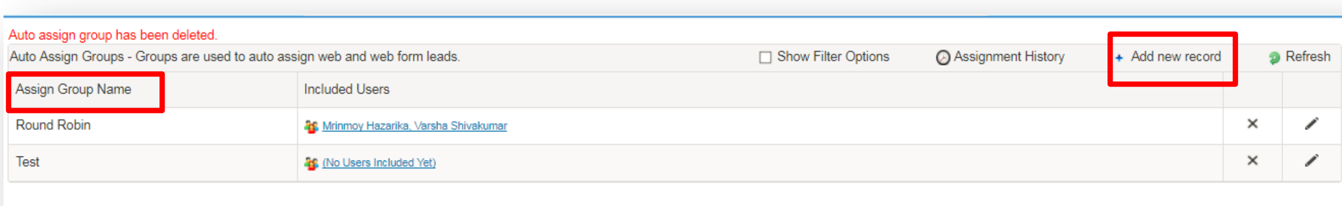
All unassigned leads can be assigned by source by percentage.

a) Navigate to Administration > Lead Distribution
b) Select Assign Leads by Source at the top of the page
c) Select the source you would like to assign
d) Select the users you would like to assign this lead source to
e) Distribute the percentage of leads if you have selected more than one user. If you have only selected one user for this lead source, then assign 100% of the leads to them
f) Click Assign Leads

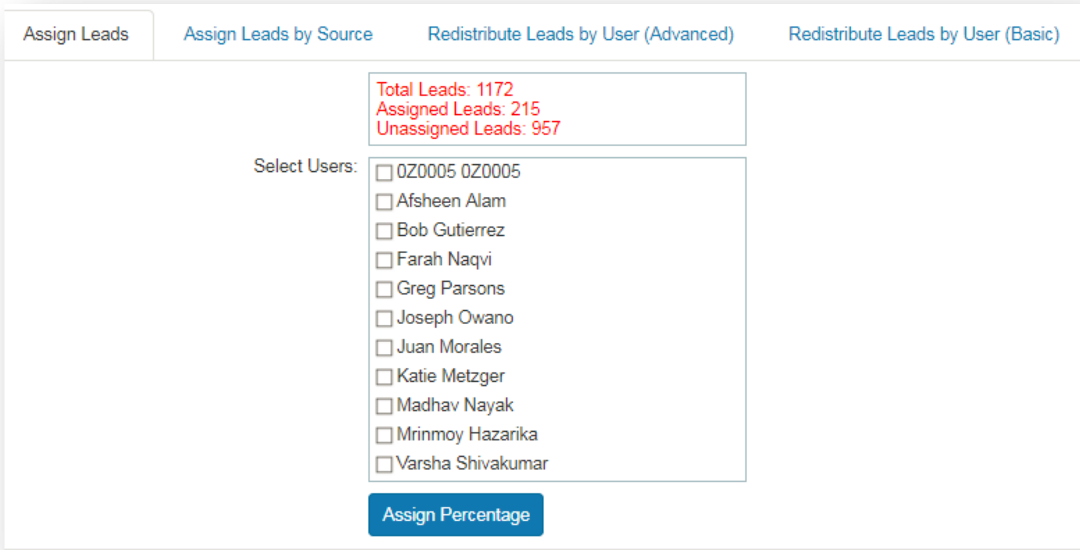
3) Leads added in bulk (e.g. Home office or regional lead lists)

Leads added in bulk are generally assigned in bulk, by percentage. To assign leads in bulk:

a) Navigate to Administration > Lead Distribution
b) Select the users that you would like the leads distributed to. Click “Assign Percentage”
c) Give each user a percentage by typing it into the provided text box. If there is only one user selected, type 100%
d) Make sure only unassigned leads are being distributed in the dropdown box to avoid reassigning existing leads



a) Click “Assign Leads”. The new assigned users will receive an email notification indicating they have new assigned leads



4) Leads in a custom list

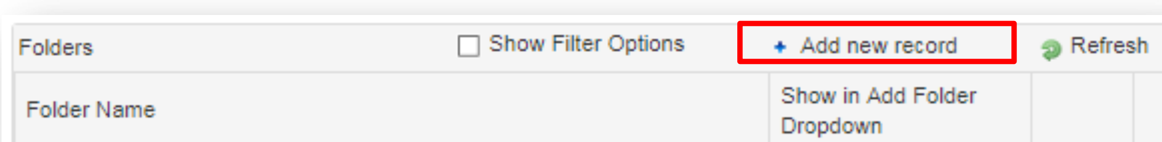
If you would like to assign a group of leads based on a filter instead of all at once (for example, you would like to assign a group of leads based on city or zip code), you can also assign leads from the Lead List. This method can be used for any type of leads. To use this method:

a) Navigate to Leads > Leads- All > All and use the down arrow beside each column header to filter to only the leads you would like to reassign.
b) Click the top checkbox on the left of the list to select all contacts on the page.
c) A pop-up will appear on the top of the list with the option to select all the leads in the list. Click Select if desired.
d) Once you’ve selected at least one lead, above the list “Select Action” will be visible.
e) Select Assign To. Choose the user you would like to assign contacts to in the dropdown.

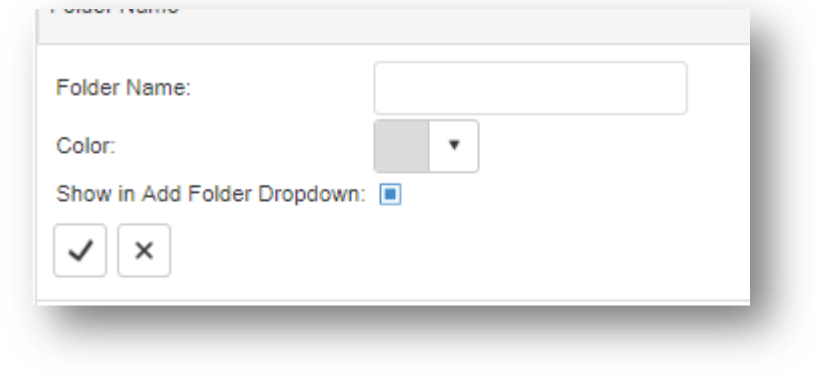
5) Folders

You can also assign leads to folders.

a) Navigate to Administration > Folders.
b) Use Add New Record to create a folder.



a) Name the folder and choose a color.
b) Check “Show in Add Folder Dropdown” if you want the folder to be visible to users when they are working leads.



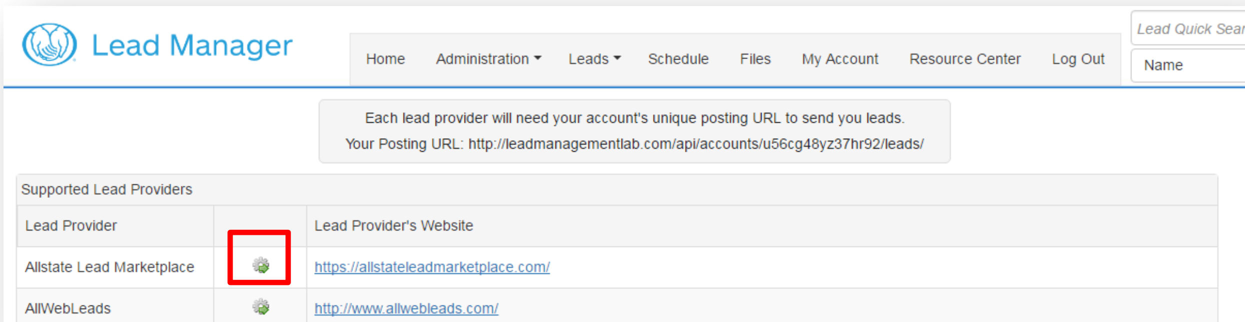
V) Setting Up Integrations

1) Web Lead Providers

Web leads drop into Lead Manager automatically, and can be auto assigned to a user to contact the lead immediately. They can also automatically be put in a folder. To set up web leads:

a) Navigate to Administration > Web Lead Setup

b) Click the “Configure” link for your lead provider.



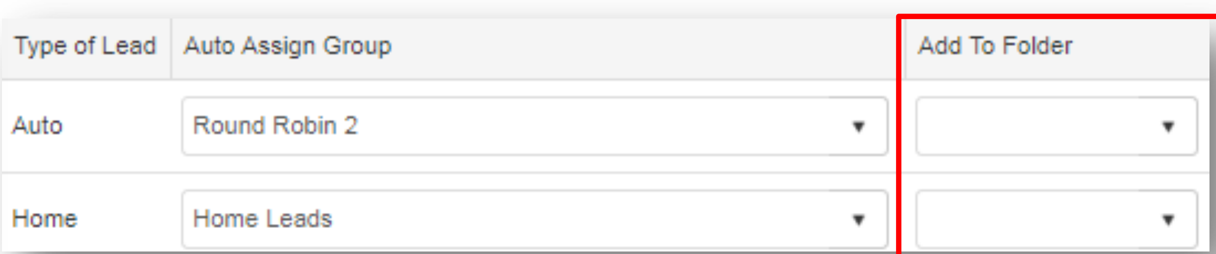
c) You will see dropdowns to select an Auto Assign Group. There are three methods used to assign new web leads:

   (1) If you would like leads assigned to a group of users in a round robin fashion, select an Auto Assign Group from the dropdown and click “Save Settings” again. You can have different Auto Assign Groups for different lead types (for example, if you have a different user that works Life leads, you could use a different Auto Assign Group that is set up for that user).
   Note: Auto Assign Groups must be configured in Administration > Auto Assign Groups.

   (2) If you leave the Auto Assign Group dropdown(s) blank, the leads will not be assigned, and users can instead use the Shark Tank to claim leads

d) If you have multiple agencies and would like to distribute leads based on zip code, this can be custom built into your account. To set up a zip code based distribution, please contact Lead Manager support (567) 202-0244

e) You will see also see dropdowns to add certain types of leads to a folder.



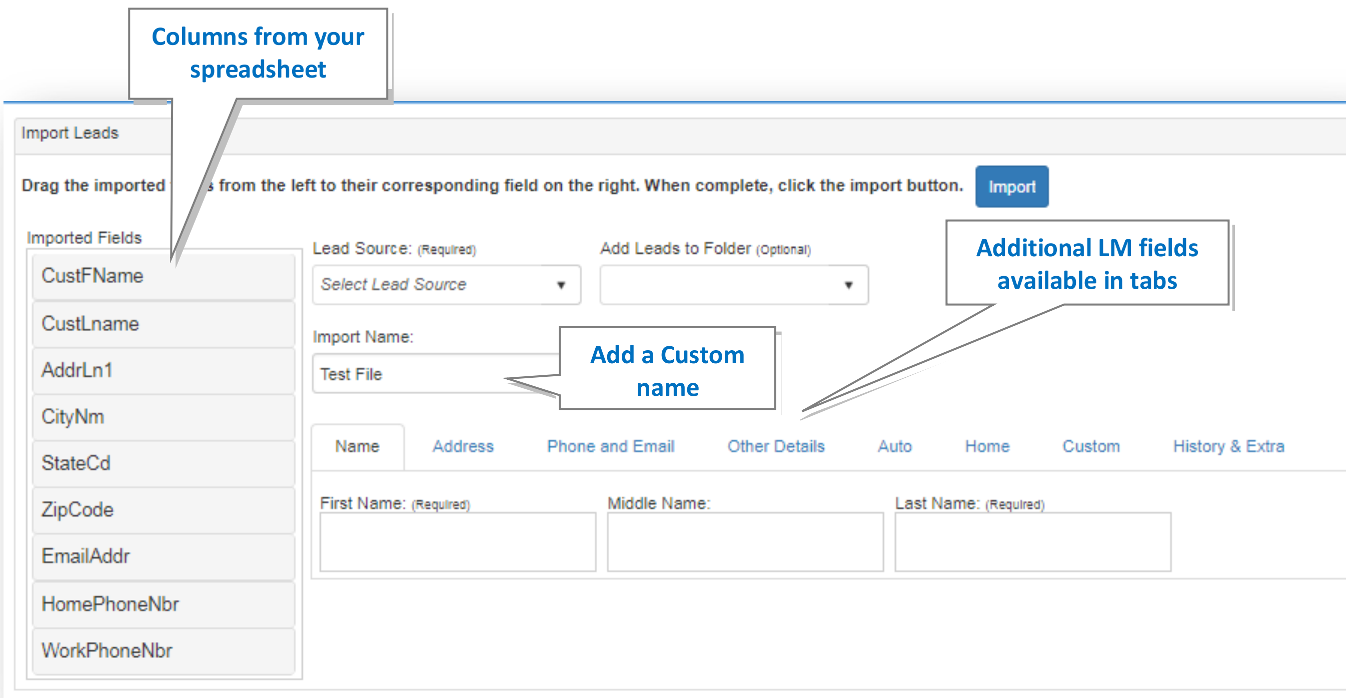
f) To complete the integration, you must notify the lead provider that you have a Lead Manager account. They will need your posting URL, which can be found at the top of the page in Administration > Web Lead Setup.

VI) Bringing in Leads from Other Sources

1) Importing Lists

Any CSV file can be imported into Lead Manager for sales follow up. Common examples include purchased lists, winback lists, saved quote audits, and TaG lists. To import a spreadsheet:

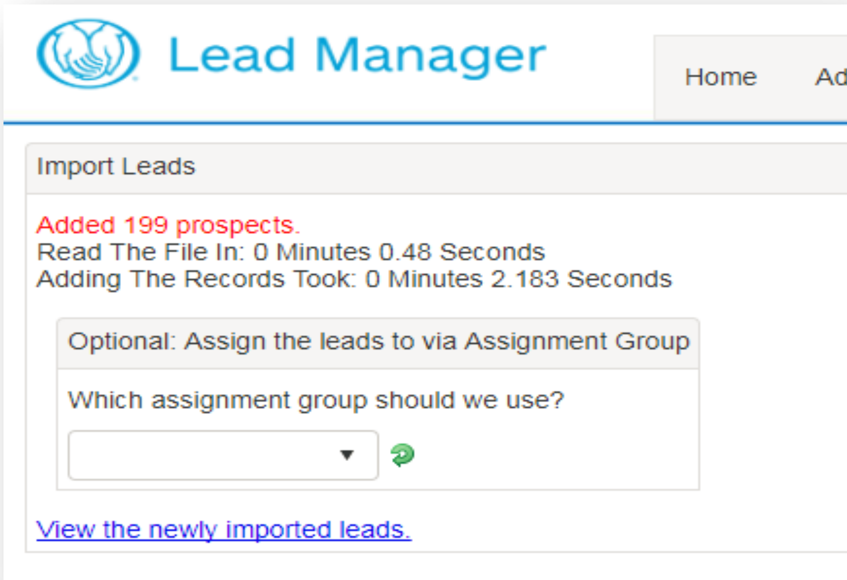
a) Check to see if the spreadsheet is in a CSV format. If it is not, open the spreadsheet in Excel and save it as a CSV.
b) In Lead Manager, navigate to Administration > Import Leads.
c) Click "Select" to browse for your CSV file, then click "Upload."



d) Map the fields from your spreadsheet into Lead Manager. The boxes stacked on the left are the column headers from your spreadsheet. The white boxes on the right are the fields in Lead Manager. To map the fields, click on the boxes to the left, and drag and drop them into the corresponding white boxes on the right within each tab. For example, "Address" can be dragged to the "Lead Address 1" box. Anything can be dragged to the custom fields.
e) Select a Lead Source from the dropdown box.
f) For the “Import Name” field, add a custom name that you would like the list to be called
g) Assign the leads to a folder, if desired.
h) Click “Import”. You will then see a confirmation page that your leads have been added.
i) Tips and additional information:
    (1) If first and last name are separated on your spreadsheet, both can be dragged to "Lead Name"

(2) An unlimited amount of information can be dragged into the "History Note" box under the "History & Extra" tab. This information will be displayed as a history note on the lead log.
(3) If you receive an error, follow the instructions within the error to correct the mapping or fix the error on the spreadsheet

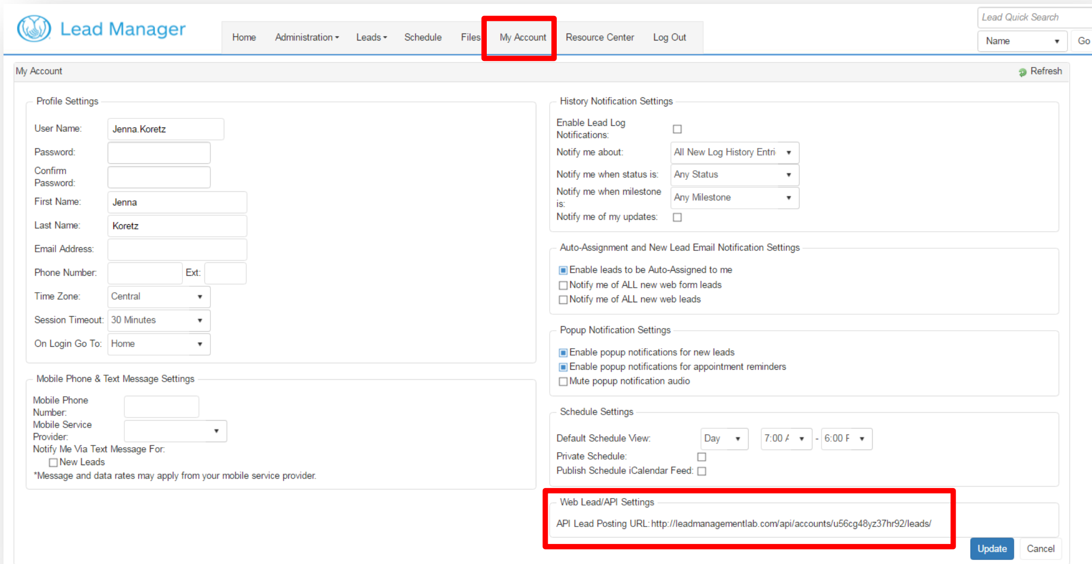
j) After importing you can assign the newly imported leads by using Auto assign group.



2) Salesgenie

Configuring the Salesgenie integration allows you to send leads from Salesgenie directly to Lead Manager without having to export a file from Salegenie. To transfer a list of leads from Salesgenie to Lead Manager:

a) In Lead Manager, navigate to the My Account tab, and locate the API Lead Posting URL on the bottom right. You will need this information for step 2, so keep this page open in a separate tab or window.



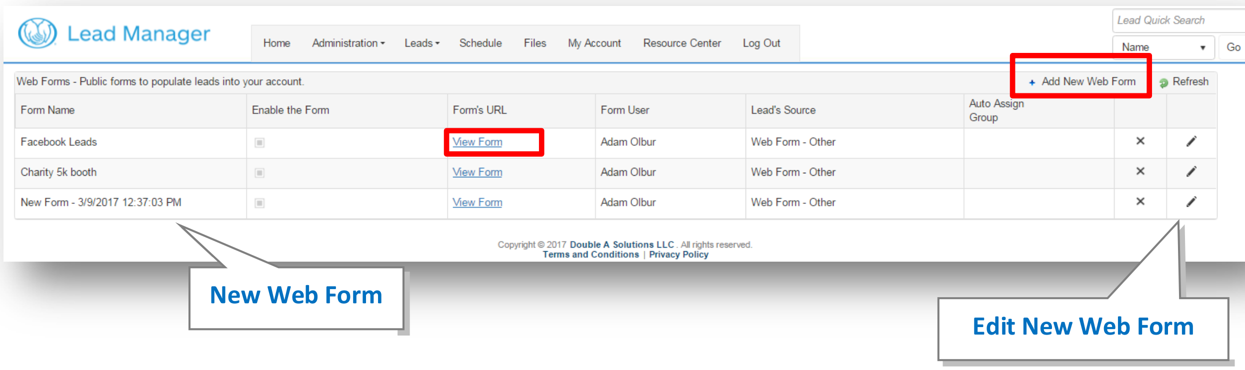
b) In Sales Genie, find the list that you would like to transfer to Lead Manager and click Export. On this screen, choose the "Export to LML" tab. You will need to enter your API information from step 1 here, as well as the number of records to export.
c) In Lead Manager, navigate to the Files tab, find the Sales Genie Import file (this will be on the top of the list), and click the "Import File" icon (grey box with a green arrow). This will take you to the import screen, where you can finish importing the file.
Note: See the Importing Lists section below for instructions on completing the import

3) Creating Web Forms

Web Forms can be created to bring in leads automatically from various sources. Common uses for web forms are adding a form to your website, sending a form to customers asking for referrals, and providing a way for social media users to ask for a quote. To create each web form:

a) Navigate to Administration > Web Forms. Click "Add New Web Form". This will create a new form automatically, and will be displayed in the list below.
b) To customize the new form, click the edit pencil to the right of the form.
c) If you would like to assign leads automatically as they drop into Lead Manager, select an "Auto Assign Group" from the dropdown in the first column.
Note: Auto Assign Groups can be created and edited in Administration > Auto Assign Groups
d) Using the check boxes, select the fields you would like to be available on the form.

e) Click the "View Form" link. This will open up your form in a new window. You can then use the URL in your browser to display or use your form how you'd like.



4) Adding Individual Leads

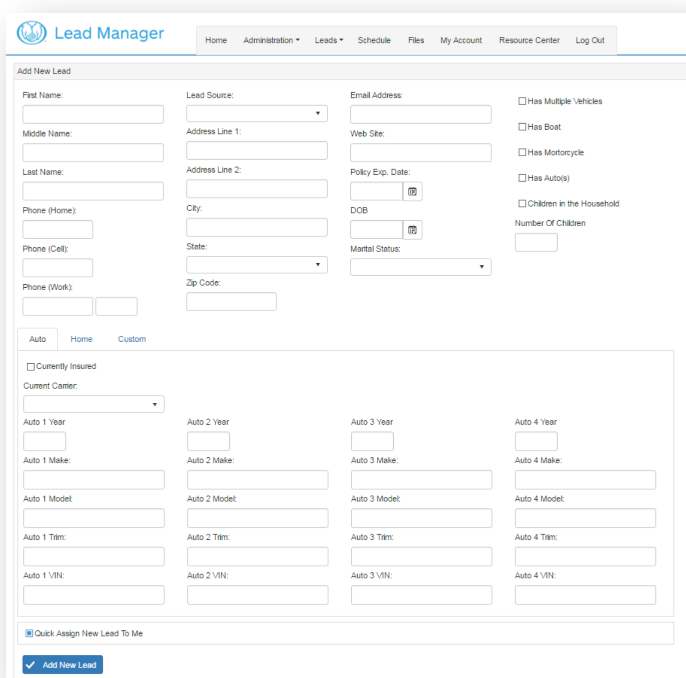
Leads can be typed into Lead Manager individually. Common examples are referrals, walk-ins, and leads from events.

To add a new lead:

a) Navigate to Leads > Add New Lead

b) Fill in the Lead's information within the available fields

c) Click “Save”. The lead log will automatically open after you save. The lead will automatically be assigned to you. If you’d like to assign the lead to another user, select the user’s name in the “Quick Assign” dropdown within the Activity tab.

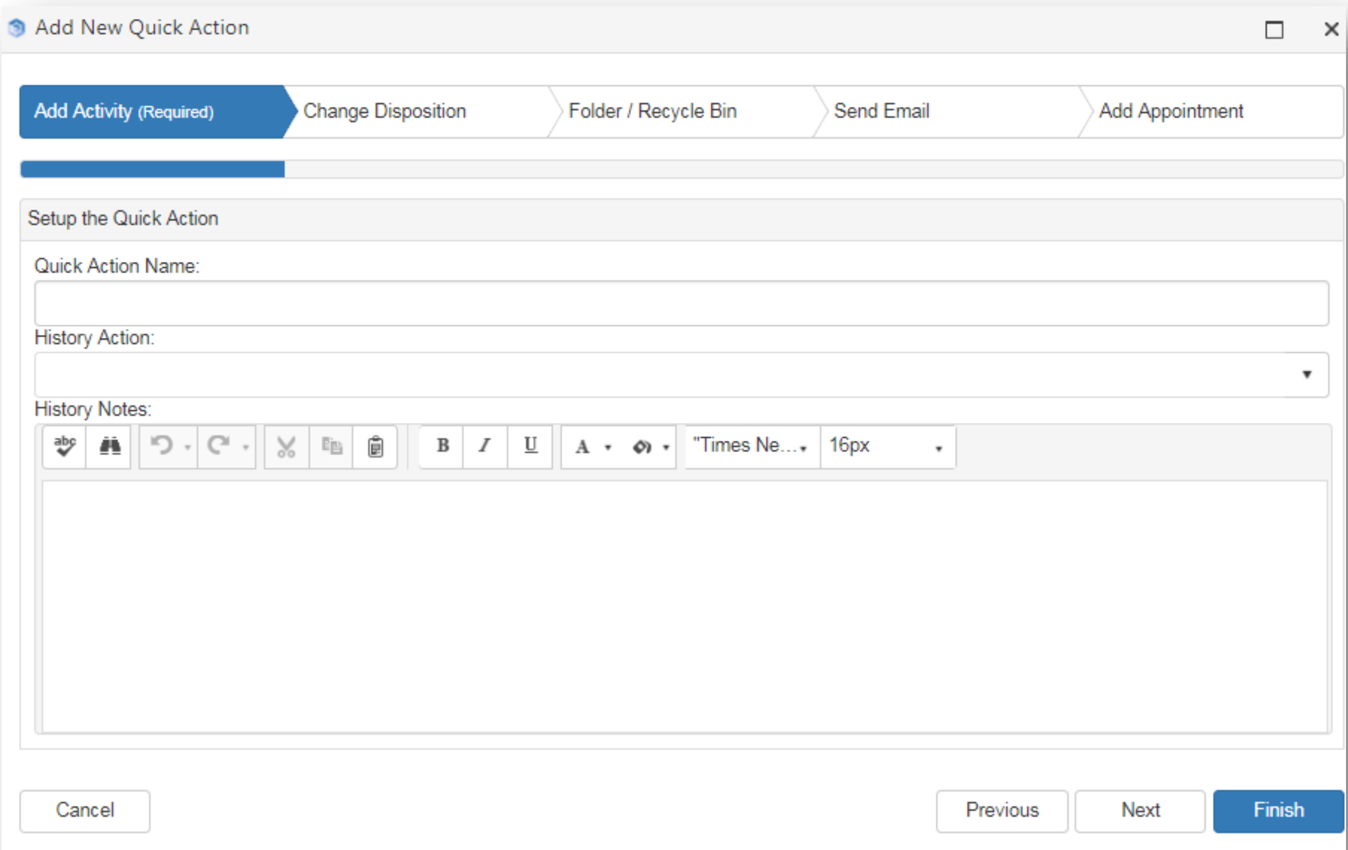


VII) Setting Up Contact Strategies

1) Setting Up Quick Actions

The best practice around dispositioning is to create quick actions. A Quick Action is a one-click solution that your staff can use to update leads quickly. They are available in the activity tab within each Lead Log. By customizing Quick Actions, your staff will be consistent and will adopt the system more efficiently.

a) Go to Administration > Quick Action. On the top right click Add New Quick Action.



b) Name the Quick Action.

c) Select a History Action.

d) Under Change Disposition, select a Status and Milestone (optional).

e) Add to Folder or move the lead to the Recycle Bin, if desired.

f) Send a follow up email, if desired.

g) Schedule an appointment on your calendar (to follow up), if desired.

2) Turning on Workflows

Lead Manager provides several pre-built Workflows optimized to streamline your sales follow up process.

a) Go to Administration > Workflows.

b) Click the icon to view the filters, triggers, and actions for each workflow.

c) To turn on a workflow, click the button. The icon should appear as now.

d) To view workflow history, go to Leads > Running Workflows.