

CENTRALIZED LEAD DISTRIBUTION PROGRAM: IDENTIFYING YOUR LEADS IN LEAD MANAGER



1. Log into your Lead Manager account at: www.allstateleadmanager.com

Lead Manager

Username:

Password:

Passwords are case sensitive.

Log In

Reset password

Upcoming Webinars

Register for Lead Manager

2a. From the *home screen* you can find new opportunities from the Centralized Lead Distribution Program by viewing the *Lead Spotlight*.

Lead Manager

Home Administration Leads Schedule Files My Account Resource Center Log Out

Lead Quick Search
 Name Go

Account Overview All Customer Prospect Business

CL Internet/Transfer Orders On

Grant All Users Admin Permissions

Import Lists OFF
 Quick Assign Leads OFF
 Create Folders ON
 Create Quick Actions OFF

Unassigned Leads

Shark Tank ON Web All

	Web Leads Days 1-14	OK to Call	OK to Email Cannot Call	Cannot Email Cannot Call
Summary	0	134	22	79

Assigned Leads All Web 1-14 Days Callable Email Only All

	Highly Engaged	Engaged	Warmed	Cold
No Milestone	0	0	0	
Attempting Contact	0	0	0	
Contacted	0	0	0	124
Quoted	0	0	0	15
X-Date Follow Up	0	0	0	3

Lead Spotlight

CL Likely to Bind 2
 Trigger/Reason to Contact 6

TaG Direct Mail (On)

0 0

2b. New leads will be listed in the *Lead Spotlight* under the following categories:

- “CL Shopping”- for new centralized internet leads
- “CL Trigger/RTC”- for new centralized prospecting triggers
- “CL Winback”- for new centralized unrepresented winbacks
- “CL Requote”- for new centralized unrepresented requote leads
- “CL Likely to Bind” – for new centralized prospects likely to bind

Please note: Leads will be displayed in the spotlight until they downgrade in priority (7 days after loaded into platform). See 3a to find leads after they fall out of the spotlight.

3a. To locate any centralized leads in the above categories that are no longer linked in the lead spotlight, navigate to *Leads -> All* and click into the *source* drop down.

The screenshot shows a CRM interface with a navigation bar at the top containing 'Home', 'Administration', 'Leads', 'Schedule', 'Files', 'My Account', 'Resource Center', and 'Log'. The 'Leads' menu is open, showing options like 'Shark Tank', 'Add New Lead', 'My Assigned Leads', 'Leads - All', 'Opportunities', 'Recycle Bin', 'Running Workflows', 'Call Logic Dialing Campaigns', and 'Leads Removed Report'. The 'Leads - All' option is selected, and its sub-menu is open, showing 'All', 'Web', 'Form', 'Imported', and 'Manually Entered'. Below this, a table of leads is visible with columns for 'Name', 'Status', 'Source', 'Assigned To User', and 'Last Histor'. The 'Source' column is circled in yellow, and a search dropdown is open over it, showing a search bar and a list of source categories including '(null)', 'Address Change', 'Homeowner', and 'Customer Trigger'.

3b. Search in the *source* drop down by typing in one of the following:

Centralized lead lists:

- Centralized Likely to Bind
- Centralized Prospecting Trigger
- Centralized Unrepresented Requote
- Centralized Unrepresented Winback

Centralized Fixed volume program (Internet/Live Calls):

- Centralized Internet Auto
- Centralized Internet Home
- Centralized Transfer Auto

Centralized Credit program (Internet/Live Calls):

- Centralized Internet Auto Credit
- Centralized Internet Home Credit
- Centralized Transfer Auto Credit

