

MILEWISE OPPORTUNITIES IN LEAD MANAGER

IDENTIFYING LEADS & BEST PRACTICES

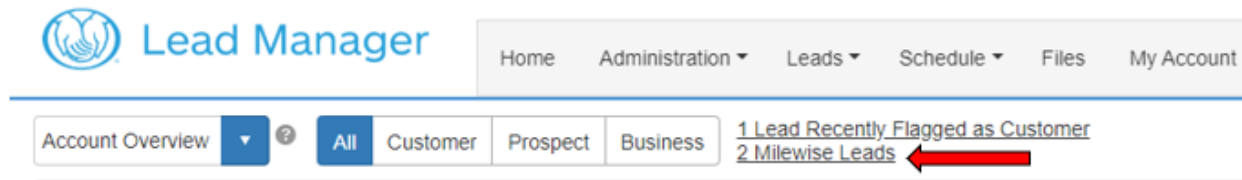


Detail

Recently, Home Office loaded leads into your Lead Manager account that were identified as Milewise opportunities.

Identifying Milewise Opportunities

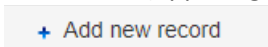
You can find these leads highlighted for you on the top of your home page:



Process Steps for Best Practices

Until Lead Manager deploys additional enhancements, we recommend this process for continued identification and awareness of these Milewise opportunities:

1. Create a new 'Milewise Leads' folder and add these leads into that folder
 - From the Home page navigation bar: Administration → Folders
 - Click on '+ Add new record' (upper righthand corner)



- Name the folder 'Milewise', choose a color, click the checkbox icon

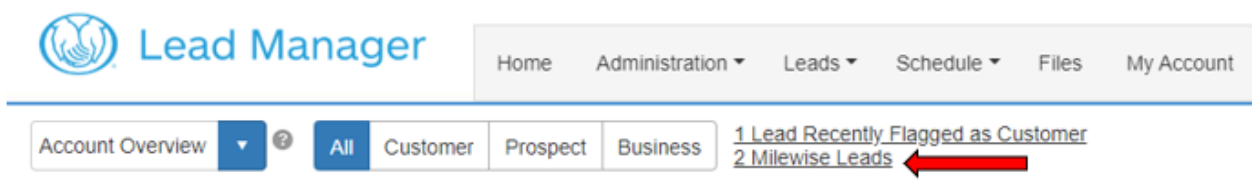
Folder Name

Folder Name:

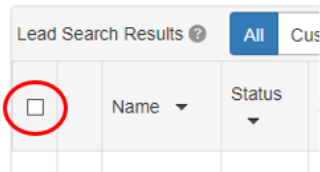
Color:

Show in Add Folder Dropdown:

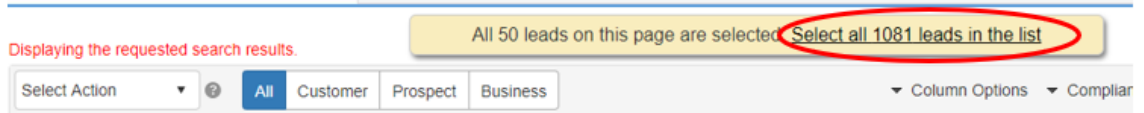
2. Add the Milewise opportunities to this new folder
 - Navigate to Home page
 - Click on the 'Milewise Leads' link on the top of the page (this will open a lead list page)



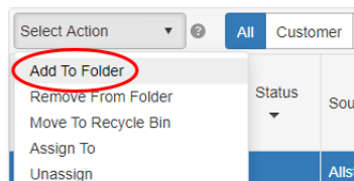
- Click on the 'select all' checkbox in the upper left corner of the lead list



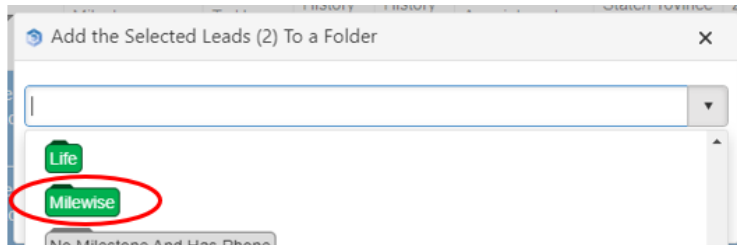
If more than 1 screen of leads are available, a select all box will appear at the top of the page. Click the link to select all.



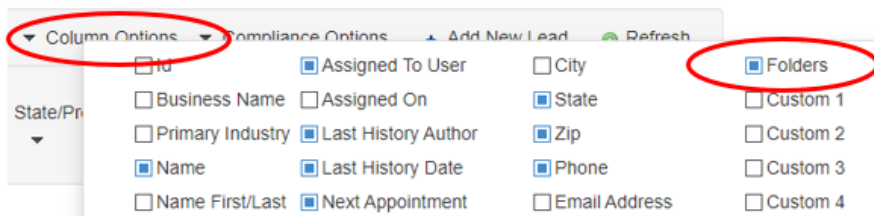
- Once all leads are selected, use the dropdown box in the upper left corner to select 'Add to Folder'



- In the pop-up window that opens, choose the Milewise folder that you created and click 'Add to Folder' button



- These leads are now added to the Milewise folder you created in step 1. On the lead list page (Leads-> Leads All), Producers can add the 'folder' option as a standard column. As they attempt to work these leads, they will know to discuss the Milewise option with consumers.



Lead Search Results													
All Customer Prospect Business Column Options Compliance Options Add New Lead Refresh													
<input type="checkbox"/>	Name	Status	Source	Milestone	Assigned To User	Last History Author	Last History Date	Next Appointment	State/Province	Zip Code	Phone	Loaded	Folders
<input type="checkbox"/>	Milewise Lead	<input type="radio"/> Cold	Allstate Lead Marketplace - Auto						Ohio	43615	(419) 841-8800 OK	7/29/2020 12:02:13 PM	Milewise
<input type="checkbox"/>	Milewise Lead	<input type="radio"/> Cold	Allstate Lead Marketplace - Auto						Ohio	43615	(419) 841-8800 OK	7/29/2020 12:03:29 PM	Milewise

4. If consumer express a disinterest in Milewise, the Producer can remove the lead from the Milewise folder.

Created
By Jeff Johnson
On Jul 29, 2020

Choose Quick Action

+ Add New Folder

Milewise

Details Activity (0) Opportunities (0) Files (0)