

NEW LEAD PROCESS

- Lead comes in.
- Lead is moved to internet lead folder and auto-forwarded to Account Reps.
- Account Rep. Replies All to email, "Got It".
- Send sales text #3 from template.
- Call lead.

NO CONTACT

- If no answer, call again immediately. No voicemails.
- Call again from internet leads folder throughout the day.
- Request credit on all bad leads.
- Lead will pick up on List View 3.

CONTACT MADE

- Delete lead from folder.
- Quote, following The Five Step Customer Experience.
- If not closed, create follow-up task.
- Send calendar invite in Outlook.
- Send sales text #2 day of follow-up to confirm appointment.



SUPPLEMENTAL INFORMATION

CREATING CUSTOM FOLDER

- Open Mail > right-click on Shared Folders (on the left side of the screen) > New Folder > Name the folder Internet Leads > Enter

CREATING CUSTOM RULE

- Open Mail > Choose the three dots at the far right on the headings bar > Rules > Create Rule > Advanced Options
- From the Rules Wizard, find the condition that will identify the message to be handled by the rule. (i.e., “when a message arrives from email @email.com.”
- Select the condition by clicking its checkbox > Next.
- Choose “forward to” and included emails for account reps.
- Choose “move to folder” and select “Internet Leads”.
- Click next, main rule (i.e., “New Lead - Quote Wiz”) > Check “Turn on this rule” > Finish



SUPPLEMENTAL INFORMATION

TEXT TEMPLATES

1. Hey XXXXX, I look forward to saving you money on your insurance at 3pm. [TM Name], [Agent Name] State Farm.
2. Hey XXXXX, I look forward to our meeting at 3pm on Tuesday the 12th. [TM Name], [Agent Name] State Farm.
3. Hey XXXXX, We are ready to save you money on your insurance. [TM Name], [Agent Name] State Farm.

SAMPLE FOLLOW-UP TASK

FORM: Works at XYZ company, been there 11 years, married to Amanda, 2 kids, Johnny (7) and Marie (3), spends time outside and travels, planning to go to Grand Canyon in June 2025

A: with XYZ paying \$135, 100/300/100, 500D, 500G, H; quoted 100/300/100, 0D, 1000G, H, R, \$142

F: no renters insurance, quoted \$30k property, \$300k liability, \$5k med with water/sewer backup for \$9.50

L: quoted 10 year term \$125k benefit for \$23.10, customer declined

H: quoted STD, \$450 benefit, 1 year benefit, 30 day elimination for \$7.21 to cover car payment

Follow-up set for ticket falling off in 3 months

