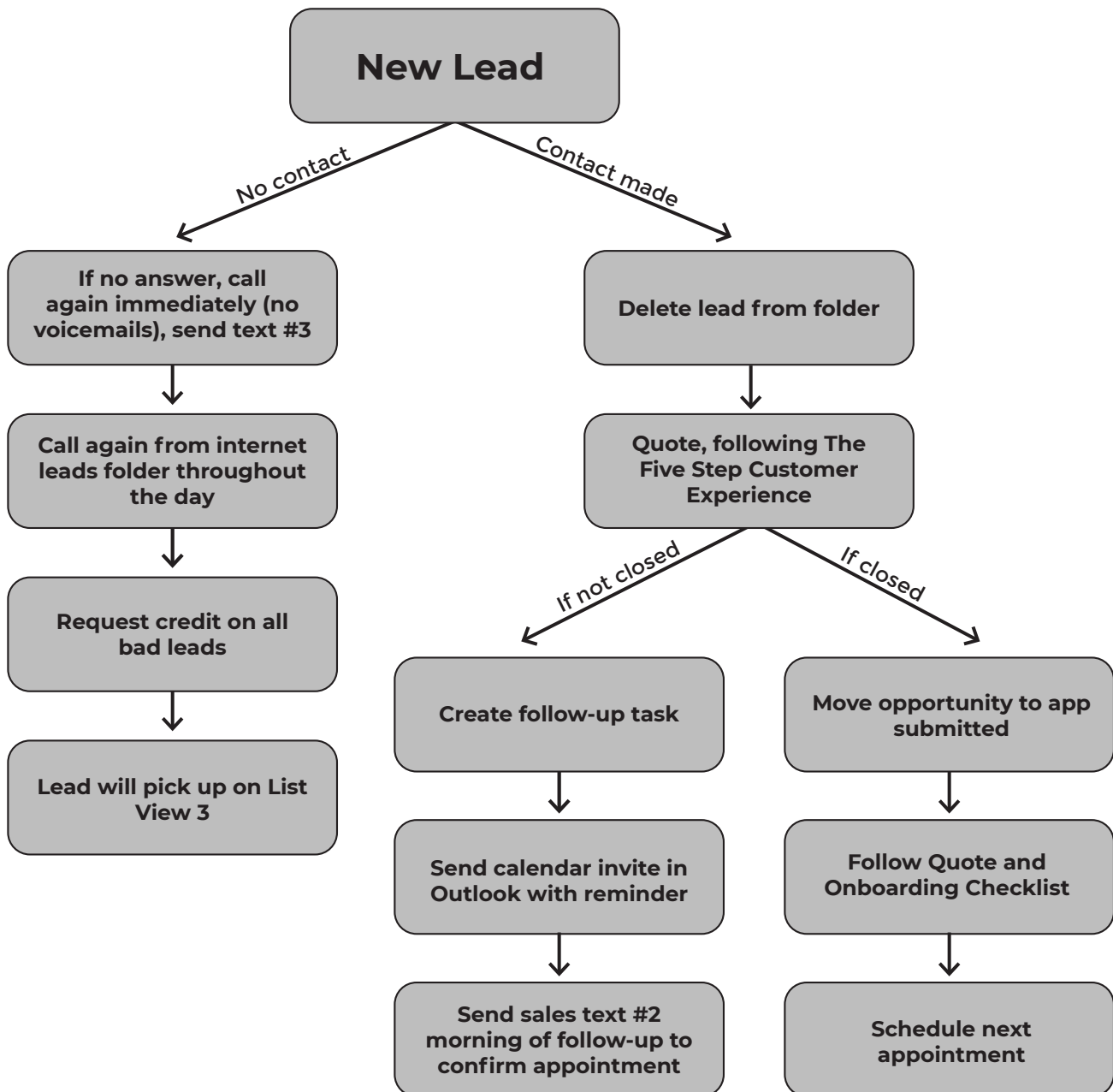


# ELEVATE WORKSHEET



## The Internet Lead Process



# ELEVATE WORKSHEET



## The Internet Lead Process

### 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 voicemails)

### No Contact

- ❖ If no answer, call again immediately (no voicemails), send text #3
- ❖ Call again from internet leads folder throughout the day (min 3PM Power Hour)
- ❖ Request credit when appropriate (see vendor requirements)
- ❖ 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 with reminder
  - Send sales text #2 morning of follow-up to confirm appointment
- ❖ If closed:
  - Move opportunity to app submitted
  - Follow Quote and Onboarding Checklist
  - Schedule next appointment



# ELEVATE WORKSHEET



## 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 Internet Lead”) > Check “Turn on this rule” > Finish

### 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 12. [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.



# ELEVATE WORKSHEET



## 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 STDI, \$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



# ELEVATE WORKSHEET



## Upcoming Classes

- ❖ April 1: Quick Hit - Overcoming Step One Objections
- ❖ April 2: Elevate - New Hire Training Plan
- ❖ April 7-9: Evolve
- ❖ April 8: Quick Hit - Pivoting on Inbound Calls
- ❖ April 13-14: Evolve II Sales
- ❖ April 15: Quick Hit - Open Q&A

## Trophy Club Links



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