Salesforce Lead Creation

Workflow Document

Objective

To create leads in Salesforce following a department standard that ensures data accuracy.

Tools

- **Salesforce**
- ***Cold Lead Qualification* Workflow Document, located at H:\Marketing\Phone Outreach\Workflow Documents\Lead Outreach & Qualification**

Process

Note: If you're currently working on lead mining / lead gen, Cold Lead Qualification training is required.

Step 1: Information Gathering

- Before creating a new lead, you will need to have the following information:
  - First and last name
  - Primary Role / Job Title (if available)
  - Company name
  - Company address (mailing and physical if available and different)
  - Distributor (if available)
  - Phone number
  - E-mail address
  - Lead Source

Step 2: Duplicate Search

- Conduct a search for any duplicate profiles, former agency records or records with matching agent information. Check by:
  - First and last name
  - E-mail address
  - Phone number
- If you do **not** locate an existing lead record OR you locate a distributor record, proceed
- If you locate an existing lead record, **do not create a new lead.**

Step 3: Create the Lead

- If you are creating a new lead that is **not** attached to a distributor:
  - In Salesforce, locate the "**Leads**" tab along the top row and click on it. The top row is located under the search box and US Assure logo.
  - Next to "**Recent Leads**", click "**New**"
  - You are now presented with the "**Lead Edit**" screen. Since this is a new lead, no information about them will be prepopulated.
  - Using the information you gathered above, enter the lead's information into the appropriate fields
  - Enter the Lead Source
    - It is imperitive that your **Lead Source** matches why you are creating the lead. If you are unsure of which Lead Source to use, please review the "Lead Source" section of this process document before continuing
  - Do not modify the "Lead Status" field

- If you are creating a distributor lead:
    - Using the **search box** at the top of Salesforce, search for the company / distributor name and click "Search"
    - Locate and select the agency under the '**Distributors**" section of the search results screen
        - Note: You may need to confirm the name / address / phone number of the agency as there may be multiple agencies with the same name (Ex: John Brown Insurance Agency)
    - Scroll to the bottom of the screen and select "**New Distributor Lead**" under "**Distributor Leads**"
    - You are now presented with the "**Lead Edit**" screen. Since you're connecting this lead to a distibutor, some information is prepopulated
        - Some agencies are large, some share numbers, and some agents work from home Always confirm the best address, contact number, and e-mail address for the lead
    - Using the information you gathered above, enter the lead's information into the appropriate fields.
    - Enter the Lead Source
        - It is imperitive that your **Lead Source** matches why you are creating the lead. If you are unsure of which Lead Source to use, please review the "Lead Source" section of this process document before continuing
    - Do not modify the "Lead Status" field
- Scroll to the bottom of the screen and click "Save"

Lead Source Definitions

- **Common Lead Sources:**
    - **Contact Us Form:** Leads sourced from "Contact Us" form submissions on usassure.com
    - **Phone Call:** Leads sourced during a phone call
    - **Manual Internet Search & Collection**: Leads sourced as a result of lead gen efforts
    - **Info box Email:** The lead is a result of working a forwarded e-mail from the Info Box that doesn't match any other Lead Source
    - **ZProgramsMatch:** Leads entered as a result of a ZProgramsMatch e-mail.
    - **Program Business:** Leads entered as a result of a ProgramBusiness.com e-mail.
    - **Complete Markets:** Leads entered as a result of a Complete Markets e-mail.
- **Rare or System-Generated Lead Sources (Consult your supervisor before using)**

Company Website	Face to Face Contact	General Internet Search Engine
Inactive Producer Record	Industry e-Newsletter Ad	Industry Magazine Article
Insurance Industry Search Engine	Other (specify)	Professional Colleague
Sales Materials via Mail or Email	Social Networking Website	Video
Web Digital Advertisement	Webinar	Workshop
Campaigner Opt-out	EDW – Distributor	Kirschners
Klein	Advertisement	EDW – Producer
Incomplete Registrations	BDL Lead	KL Pilot
FaxPro	Incentive Campaign	Conference or Tradeshow

Step 4: Qualify the Lead (if necessary):

- To continue, please access the workflow document titled *Cold Lead Qualification* located at **H:\Marketing\Phone Outreach\Workflow Documents\Lead Outreach & Qualification**