UW Results Frequency Project

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Solution Scope – Processes

Send Results Process	We are willing to adjust our Send Results process to reduce the work effort for the Sales Support staff.
Follow Up on Leads	We are willing to adjust the Follow Up on Leads process.

Solution Scope – People

Training – Sales Associates	Sales Associates will need to be trained on any changes to their processes or procedures
Training – Sales Support	Sales Support will need to be trained on any changes to their processes or procedures

Solution Scope – Technology

Software	Create a custom piece of software that can be utilized by the Sales Team to simplify the effort needed from Sales Support for the weekly (soon to be daily) lead status and report pulls
SSRS	As we are familiar with it, utilize this technology (SSRS) to create the reports necessary for our UW client

Items Out of Scope

- Receive Leads process should not be changed with this project
- Only need lead status, so at this time we won't be tracking individual activities/actions on leads (call attempts, call outcomes, etc.)
- Reports will not pull past lead status data, only data moving forward after implementation