



HUMAN HABITATS

# Lead Allocation

**Administrative Policy**

**June 2025**

## Policy Summary

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Policy Name: Lead Allocation

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Attributable to: All Staff

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HH measure new Jobs and Clients as Leads. Such leads are important to the business as we need to have projects, clients and new business coming into HH to sustain our team year to year.

The policy seeks to be transparent about lead tracking and reward and recognise the individual/s for generating business development leads, while being flexible and taking a team oriented approach to such recognition.

HH tracks lead allocation figures which assists Human Habitats in tracking and identifying strong performance & career progression.

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## Lead Generation Principles

This policy relates to *generation* of leads through the establishment of contacts/relationships, not the *conversion* of jobs.

For example, where a lead is brought to the team, it provides the opportunity for any number of people to convert that lead into a project. Human Habitats want to encourage lead generators to disperse leads through the business.

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## Lead Types

There are two lead generation types that HH records.

### Client Lead

A Client Lead is a lead that results in a new client for HH.

The lead is attributed to the consultant who establishes the relationship through whom a new project is generated.

### Job Lead

A Job Lead is a lead generated that results in a new job.

The lead is attributed to the consultant who generates the lead for a new project. If this is with an existing client, the lead will be noted as Job Lead only (not Client Lead).

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## Lead Generation Rules

The following are overarching rules to enable lead allocation. Teamwork is encouraged and recognised through dual leads where appropriate.

### New Original Client

Where a new original client engages HH on a new project:

- Client Lead is attributed to the consultant who is the originator of the contact that generates a new project via client for Human Habitats; and



- Job Lead is attributed to the same consultant for that first project

#### New Project with Existing Client

Where a new job lead is generated from an existing and active client:

- Client Lead is unchanged; and
- Job Lead is attributed to the consultant who generated the lead for the new project.

#### Existing Clients

CL does not change for existing and active clients unless:

- That Client is a large company with very obvious separation between sectors, departments, states etc;
- It is demonstrated there is no existing relationship with the Client for a new Client Lead contact; or
- There is a demonstrable combined or team effort in re-securing a new job (shared Client Lead or HH Lead).

#### Inactive Clients

For existing but inactive clients (all jobs complete), the CL should change to dual Client Lead:

- When the Client has been inactive for a period of 18 months; and
- Where a consultant other than the existing Client Lead brings in a new project.

Where a new Client takes over an existing job:

- The existing job stays with the original JL as that job lead would be considered pivotal in a new client continuing with HH;
- If HH's previous involvement on the project was the primary catalyst for the new Client coming to us, HH becomes the new CL;
- A new Client Lead may only be created if the consultant can demonstrate they brought the Client onto the existing project (for example they have an existing relationship and they were involved in the purchase of the new site);
- HH will become the Client Lead if no *lead* link to any consultant can be demonstrated.

#### Email Enquiry

If an email enquiry sent to info@:

- Is addressed to a staff member (not copied), it is their Job Lead and/or Client Lead; or
- Is not addressed to anyone it is a HH Client Lead and Job Lead.

In general, if an email is addressed to someone directly, they get CL and/or JL unless they or a teammate can demonstrate there is reason for the JL/CL to be redistributed to or shared with another.

#### No Clear Lead

Human Habitats will be allocated the Client and/or Job Lead.

For example, walk-ins or phone calls to the generic office number are HH Leads, unless they are seeking a specific consultant.

#### Shared Leads

There will be cases where Job Lead or Client Lead must be shared. This needs to be obvious and in line with the above rules. Where it's unclear a case can be made to Operations in the first instance and then to CEO for resolution.

Where there is a clear team effort in generating a Lead this will be noted as a HH lead.

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