

# Affinity Partnerships

## Bad Lead Request Process

---

### Document Control

#### Document Information

	Information
Document ID	<i>BadLeadReportingcgv120131105</i>
Document Creator	<i>Christine Madrid Grossmith</i>
Issue Date	<i>08/20/2013</i>
Last Saved Date	<i>11/6/2013</i>
File Name	<i>BadLeadReportingcgv120131105</i>

#### Document History

Version	Issue Date	Changes
<i>1.0</i>	<i>11/5/2013</i>	<i>Document Created</i>

Table of Contents

1    **SHAREPOINT BEST PRACTICES** ..... 3

1.1   **How to Submit a Bad Lead Request Form**

## 1 Bad Lead Request Best Practices

### 1.1 How to submit a Bad Lead for Review

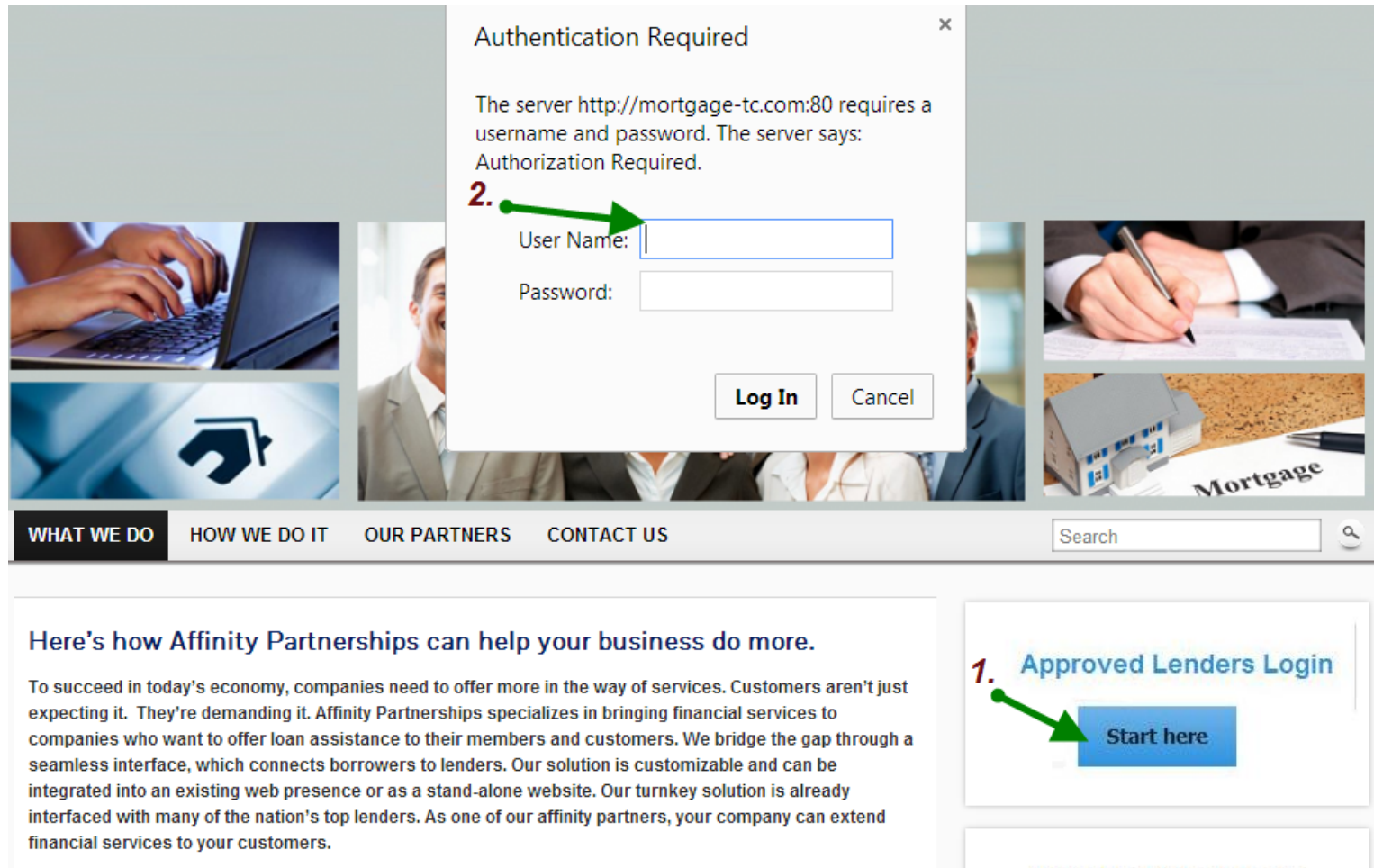
#### Definition of a bad lead:

1. Person listed did not request to be contacted
2. The telephone and email are incorrect
3. Person listed does not match the person on the record
4. Lead does not meet filter requirements (approved state, less than \$125,000)
5. Lead delivered clearly states a false name (i.e. Mickey Mouse, Del Taco, Porky Pig)

Preferred Lender acknowledges and agrees to submit Bad Lead Requests during the required timeline and follow the procedure provided. Refunds or credits will only be applied if the bad lead submission is deemed and validated a Bad Lead. Preferred Lender will be notified via email on the outcome of the bad lead request.

#### Bad Lead Procedure:

1. Lender to review the Definition of a Bad Lead to determine if the Lead falls in the required criteria.
2. Bad Lead Template is located at: [www.affinitypartnerships.com](http://www.affinitypartnerships.com)
  - a. Lender Login using : lender
  - b. Lender Password: lender



3. Click on Bad Lead Form:



## Bad Lead Reporting

November 5, 2013

4. The Bad Lead Form must be completed in its entirety. No fields are to be left blank. If the bad lead is submitted after the required timeline, the bad lead request will be declined and noted in our system.

**All bad lead requests must be submitted within 24 hours but no later than 72 hours from the time the lead was received. Any bad lead older than 3 days will NOT be validated and will be declined as a bad lead request.**

### BAD LEAD SUBMISSION FORM

All bad lead requests must be submitted within 24 hours but no later than 72 hours from the time the lead was received. Any bad lead older than 3 days will NOT be validated and will be declined as a bad lead request.

Bad Lead Submission:	BAD LEAD ▾
Date Lead Received:	<input type="text"/>
Platform:	--None-- ▾
Lender (Select):	<div><div>--None-- Costco Short Form Costco Mobile Refinance.com APWU Credit Sesame Costco Short Form Rates on the Fly</div></div>
PASTE BAD LEAD HERE (from your CRM):	<div></div>
Describe Reason for Bad Lead:	<div></div>
Borrower First Name:	<input type="text"/>
Borrower Last Name:	<input type="text"/>
Borrower's Email Address:	<input type="text"/> (REQUIRED)
Phone:	<input type="text"/>
YOUR EMAIL ADDRESS:	<input type="text"/> (REQUIRED)

Submit

Confirm which platform  
the lead was generated  
from

**Bad Lead Reporting**  
**November 5, 2013**

5. Click Submit to complete the Bad Lead Form Request. The requestor will receive an automated email validating a successful request for review.

You have successfully submitted a SUBMISSION for a BAD LEAD. This lead is being researched and someone from Mortgage Services will contact you shortly with the results.

Below is the information you submitted.

Lead ID: 00Q30000014ufcV  
Platform: Costco Short Form  
Lender:  
First Name:  
Last Name:  
Description: Bogus Number. No Email.  
Phone: 555-1111  
Submitted By: [notgiven@noemail.com](mailto:notgiven@noemail.com)  
Email:

6. Within 24 to 72 hours the requestor will receive an email response with a determined outcome of the submission.
  - a. **Confirmed Bad** - Bad Lead Request Approved – Bad lead request has been reviewed and approved based on our internal audit.
  - b. **Confirmed Good Lead** - Bad Lead Request Declined – Bad lead request has been declined based on our internal audit.