AT&T Customer Connect

LEAD MANAGEMENT PLAYBOOK

LEAD MANAGEMENT PLAYBOOK

How To Use This Playbook

NEW TO LEAD MANAGEMENT?

Welcome! This Playbook is designed to help get you started with all the tools and knowledge you need to help ACCelerate your sales with Lead Management. To get the most out of this playbook, review "How to Win" and "Customer Interaction Leads" sections before moving on to more advanced sections.

THE HOME-PAGE HAS INTERACTIVE BUTTONS TO NAVIGATE QUICKLY

EACH PAGE HAS BUTTONS TO MOVE THROUGH SECTION OR BACK TO THE HOME-PAGE

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

HOW TO WIN

SELLER | MANAGER | ARSM

GAINING ACCESS | LEAD OVERVIEW PAGE | LOG A CALL | CLOSE A LEAD

CUSTOMER INTERACTION LEADS

CREATE A NEW LEAD | GAIN CONSENT | MAKE THE CALL | SEND SMS | WHAT RIGHT LOOKS LIKE | EXTEND LEAD EXPIRATION

SMALL BUSINESS LEADS

UNASSIGNED LEADS | MAKE THE CALL | REFERRALS TO BiR

MARKETING LEADS

LOCATING LEADS | WHAT RIGHT LOOKS LIKE | CHANGE LEAD OWNERSHIP

ANALTYICS & REPORTING

INTRO TO DASHBOARDS | REAL TIME LEADS DASHBOARD | USER ADOPTION DASHBOARD | REPORT SYSTEM ISSUES

LEAD MANAGEMENT PLAYBOOK

HOW TO WIN

Get Rid of Post-Its and POWER UP Your Leads with AT&T Customer Connect Lead Management

GAINING ACCESS | SELLER | MGR | ARSM | LEAD OVERVIEW PAGE | LOG CALL | CLOSE LEAD

PLAYBOOK HOME

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How To Win! Gaining Access to Lead Management!

CC LEAD MANAGEMENT - SALES OPS JOB AID

ROLES:

SELLERS: Can only view leads assigned to them
MANAGERS: Can view all leads within their location, reassign leads to other sellers, have access to Analytics/Adoption dashboards
L2s & L3s: Can view all leads within their locations, have access to Analytics/Adoption dashboards, reassign leads
OPERATIONS: Can view all leads, have access to Analytics/Adoption dashboards. If enabled Superuser, can change lead ownership & use reporting tab for national reporting

PROFILES

OPERATIONS
(example- SEL, SEM)

- Access will need to be requested through myLogins
- If Superuser Access is needed
  - Submit USH ticket after myLogins has been approved
- Superuser Access enables ability to Change Lead Ownership & use reporting tab for national reporting

NEW L0 - L2
(example- RSC, ISM, ARSM)

- Access & Profile will be automatically built within 3-5 business days after the start date of role
- If not able to login within 6+ business days
  Submit a myLogins
- If profile does not update within 6+ business days
  - Submit a MyTickets - Ticket

How to Submit Tickets:
- myLogins Request Process
- USH Ticket Process
- MyTickets Process

NEW L3+
(example- DOS, VPGM)

- Access will need to be requested through myLogins
- If they want to see their stores' specific lead activity (outside of dashboards)
  - Submit a USH ticket w/ a list of locations that should roll up to the user
  - Dashboard hierarchy will Update with access request

HIERARCHY

Adoption & Lead Management Overview Dashboards

Hierarchy is
- Driven by Sunrise data
- Refreshed weekly

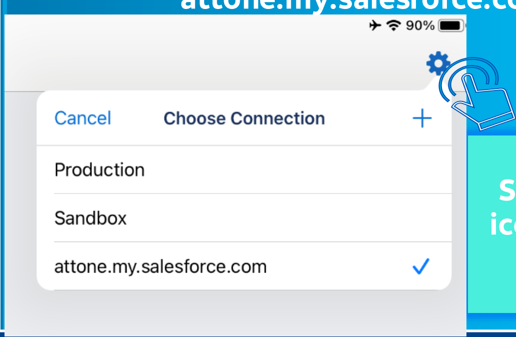
Lead Activity

i.e. Viewing Area Metrics, Lead List Views, specific leads, running customer reports

Hierarchy is
- Driven by CinglePoint data
- Refreshed daily
- L3+ is refreshed monthly; if inaccurate, follow the process above

LOG IN ISSUES

Ensure you are logging in via the option- attone.my.salesforce.com



PRO TIP! Select the gear icon on the login page to view options.

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How To Win!
Seller

Maximizing your sales with **Lead Management** is as easy 1, 2, 3!

1 Capture Customer Interaction Leads to Follow Up with Daily

2 Check the Lead Overview Page and Follow Up with Due Leads Daily

3 Call Small Business and Marketing Leads (if applicable)

TOP RECOMMENDATIONS FOR SUCCESS

- Login AT&T Customer Connect and contact leads due for follow-up
- Capture customer interaction leads
- Contact at least 2 business and marketing leads/day *(If applicable)*
- Always Log your calls and close leads- required
- Make sure to answer the phone and follow up on time
- Participate in Monthly CRU Blitz's

DID YOU KNOW? AT&T CC can easily be accessed through the iPad app, mySales Portal and OPUS

HOW TO VIDEOS

- Clock in and Connect Video
- Marketing Leads Step Action Experience
- Small Business Leads Step Action Experience

WEB-BASED TRAINING

AT&T Customer Connect Lead Management (PLE 70011316)

Launch Course

LEAD MANAGEMENT PLAYBOOK

How To Win! Manager

Quality Sales Growth with **Lead Management** is as easy 1, 2, 3!

1	2	3
1 Lead Captured per Seller per Day	80% Contact Rate	100% Adoption for Sellers & Managers

DAILY BEST PRACTICES

- Login to AT&T Customer Connect app & review due leads
- Review Real-Time Leads Dashboard- See who's logged in and how many past Due leads need attention

Confirm all working sellers have:

✓ Logged in
✓ Completed customer interaction lead call backs
✓ Contacted at least 3 marketing and/or Business leads (if applicable)
✓ Logged calls appropriately & closed leads- required

WEEKLY BEST PRACTICES

- Change Ownership of leads to working sellers
- Perform side-by-sides of outbound calls
- Check % of Marketing & Business Leads contacted
- Review Adoption Dashboard – Coach accordingly
- Review Real-Time Leads Dashboard for historical views

MONTHLY BEST PRACTICES

- Build use of Lead management into monthly goal setting plans to achieve & exceed sales goals
- Share Best Practices

PRO TIP! Create a fun competition to see if your store can get the most sellers in Connector Status!

GAINING ACCESS | SELLER | MGR | ARSM | LEAD OVERVIEW PAGE | LOG CALL | CLOSE LEAD

PLAYBOOK HOME

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How To Win! ARSM

Quality **Sales Growth** with **Lead Management** is as easy 1, 2, 3!

1 — 1 Lead Captured per seller per day & all Due Leads Contacted

2 — Check Real-Time Leads Dashboard Daily

3 — Check User Adoption Dashboard Weekly

DAILY BEST PRACTICES

Inspect each location manager has sent SMS confirming each seller has:

- Made and logged calls for at least 3 Business and/or Marketing leads *(if applicable)*
- All due today and past due leads are contacted
- All sellers working have entered a customer interaction lead

Real Time Leads Dashboard Confirmation:

- ✓ All working sellers logged in
- ✓ At least 3 calls made & logged per seller *(if applicable)*
- ✓ All past due leads contacted
- ✓ Sellers working captured a new lead

WEEKLY BEST PRACTICES

Inspect overall performance

- Adoption %
- Seller's last login
- Leads Created
- Past Due
- % Leads Contacted

MONTHLY BEST PRACTICES

- Integrate in Monthly Goal-Setting plans
- Schedule & Observe Monthly CRU Blitz's
- Share Best Practices

PRO TIP! Create a fun competition to see which store can get the most sellers in Connector Status!

GAINING ACCESS | SELLER | MGR | ARSM | LEAD OVERVIEW PAGE | LOG CALL | CLOSE LEAD

PLAYBOOK HOME

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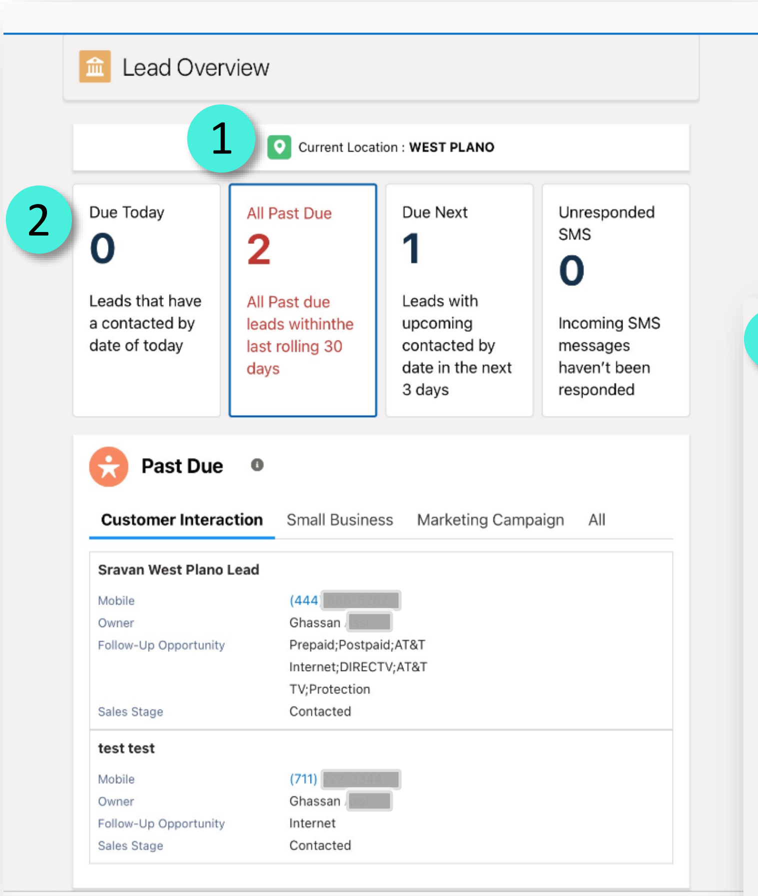
Lead Overview Page

Easily **Manage your Funnel** daily!

Login and Access Daily

- ✓ Contact all Past Due & Due Today Leads
- ✓ Respond to Unresponded SMS
- ✓ Access Lead Lists
- ✓ Check Store Rankings



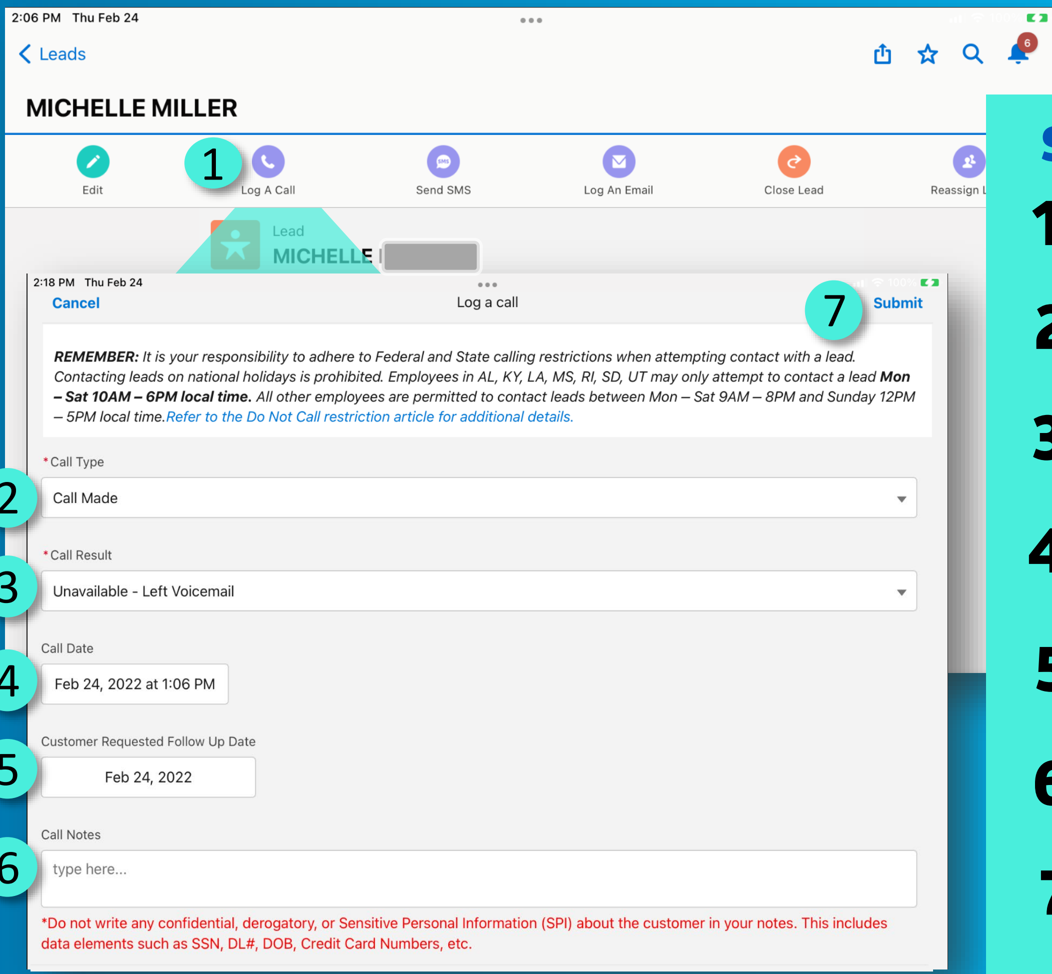
FEATURES

1. Change Location to view leads in another location
2. Interactive Tiles to easily access what leads to act on
3. Rankings by Adoption Level and Leads Created
4. Lead Count by Product
5. Lead Lists by type

LEAD MANAGEMENT PLAYBOOK

Log a Call

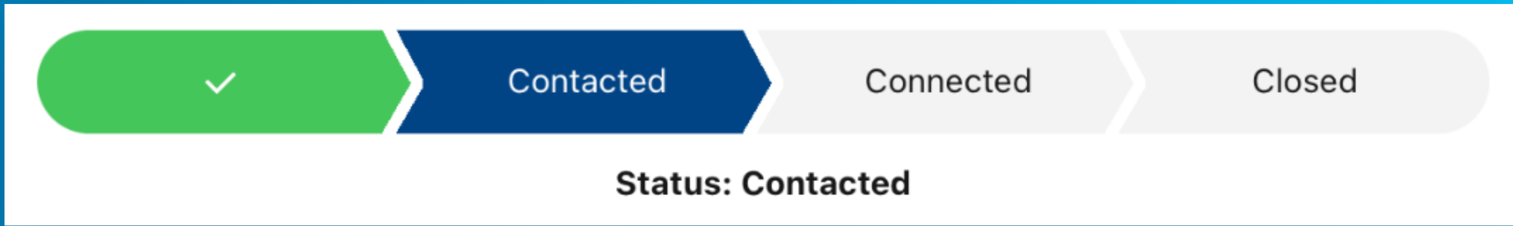
Logging each call will ensure the lead status updates, and the lead does not go into a Past Due status.



Steps to Log a Call

1. Select Log a Call
2. Enter Call Type
3. Enter Call Result
4. Enter Call Date/Time
5. Enter Next Follow Up Date (if applicable)
6. Enter Call Notes
7. Select Submit

DONE! Notice that the lead will change to “Contacted” or “Connected” status



DID YOU KNOW? The lead will move into **“Contacted”** Status when you log an unsuccessful call, and **“Connected”** status if the call was Successful!

GAINING ACCESS | SELLER | MGR | ARSM | LEAD OVERVIEW PAGE | LOG CALL | CLOSE LEAD

PLAYBOOK HOME

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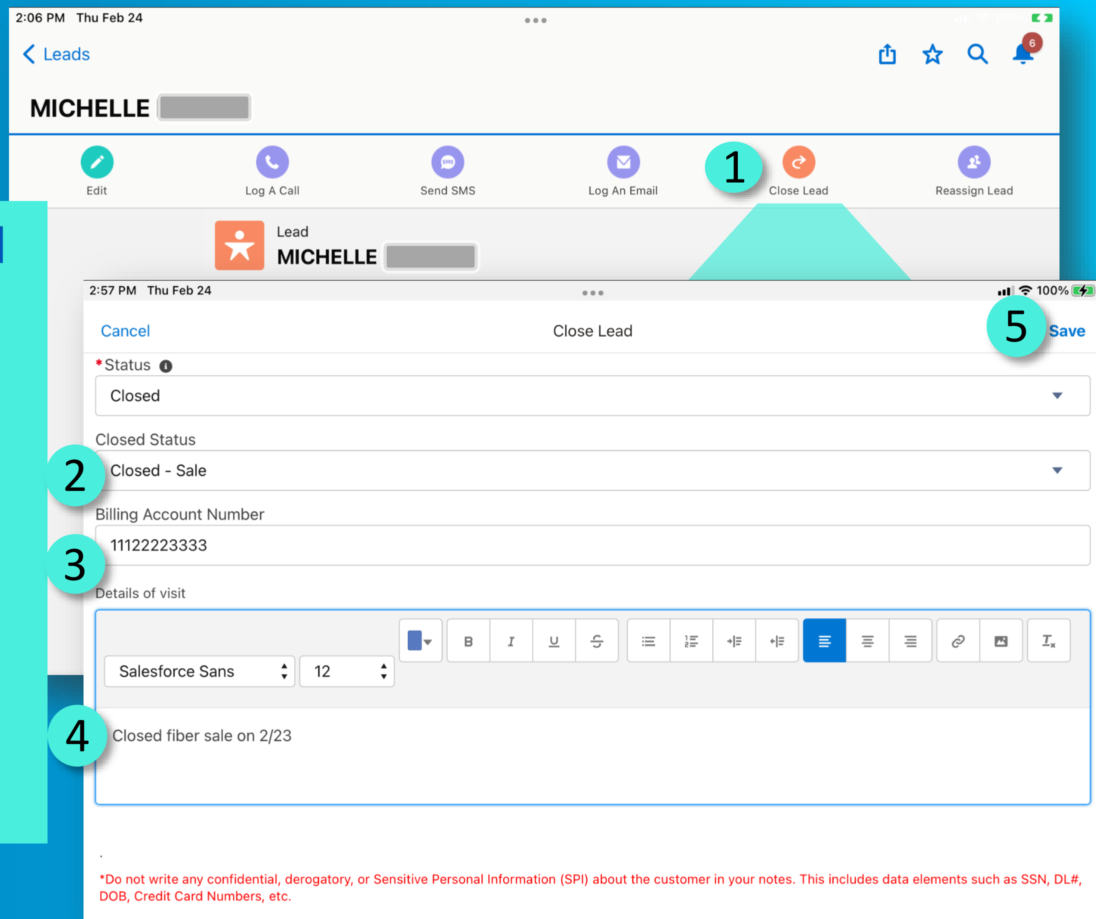
Close Lead

When the lead is closed with or without sale, it is important to close the lead in the tool.

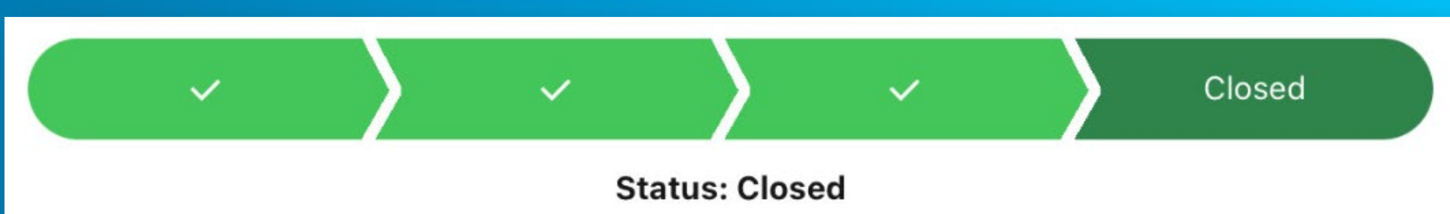


Steps to Close a Lead

1. Select Close Lead
2. Select Closed Status
3. Enter Billing Account Number (if applicable)
4. Enter Notes
5. Select Save

NOTE: When the lead is closed with or without sale, you are required to always close the lead in the tool

DONE! Notice that the lead will change to "Closed" Status



PRO TIP! Adding the Billing Account Number for a closed sale allows the **sale to be matched** to the lead in reporting!

GAINING ACCESS | SELLER | MGR | ARSM | LEAD OVERVIEW PAGE | LOG CALL | CLOSE LEAD

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CUSTOMER INTERACTION LEADS

LEAD MANAGEMENT PLAYBOOK

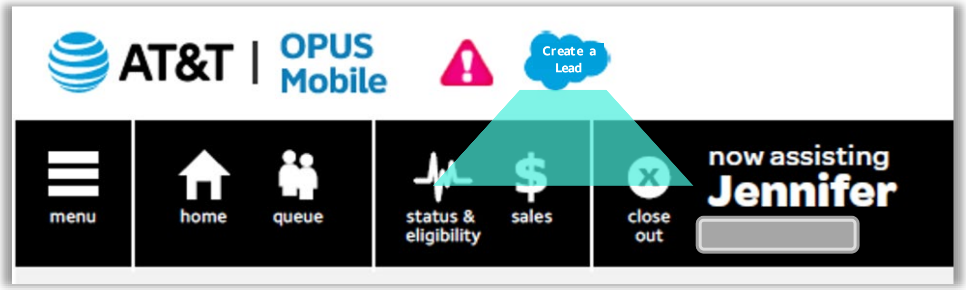
Create a New Lead

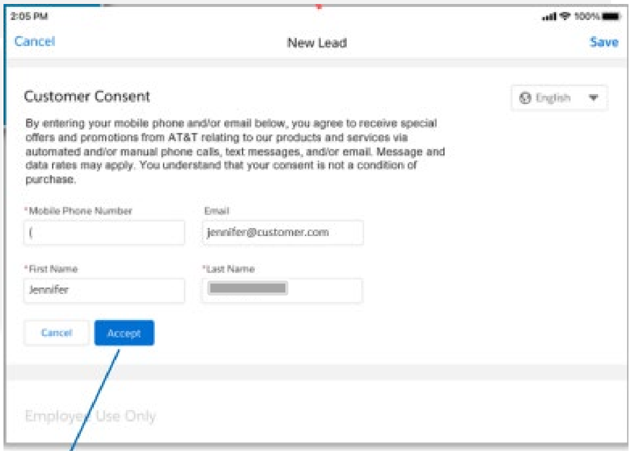
Customer didn't want to buy today? With **Lead Management**, you can capture the customer's contact information and follow up by phone or SMS!

Important! The customer must be in person to provide consent when you capture the lead information and enter it into the tool.

FROM OPUS: EXISTING CUSTOMERS

IT'S EASY! Once the customer has been authenticated, the cloud icon appears in OPUS. When you select this, the application will open, and you will now be able to complete the new lead form.

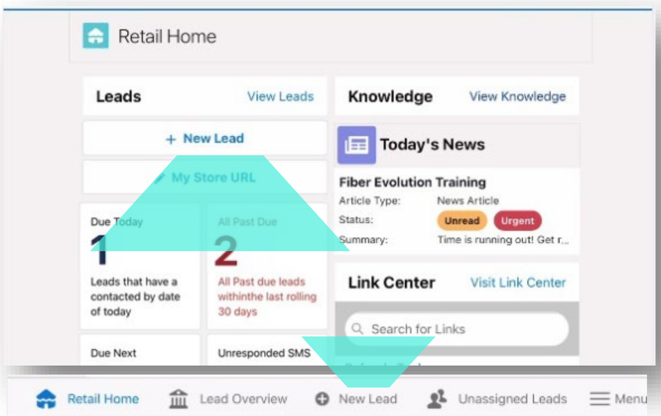




DID YOU KNOW? When you start a new lead from OPUS, the Name, Email and Mobile # (if available) are **pre-filled** on the new lead form!

NOTE: The customer must consent to the follow-up contact (click "Accept") on the iPad.

FROM THE CUSTOMER CONNECT APP

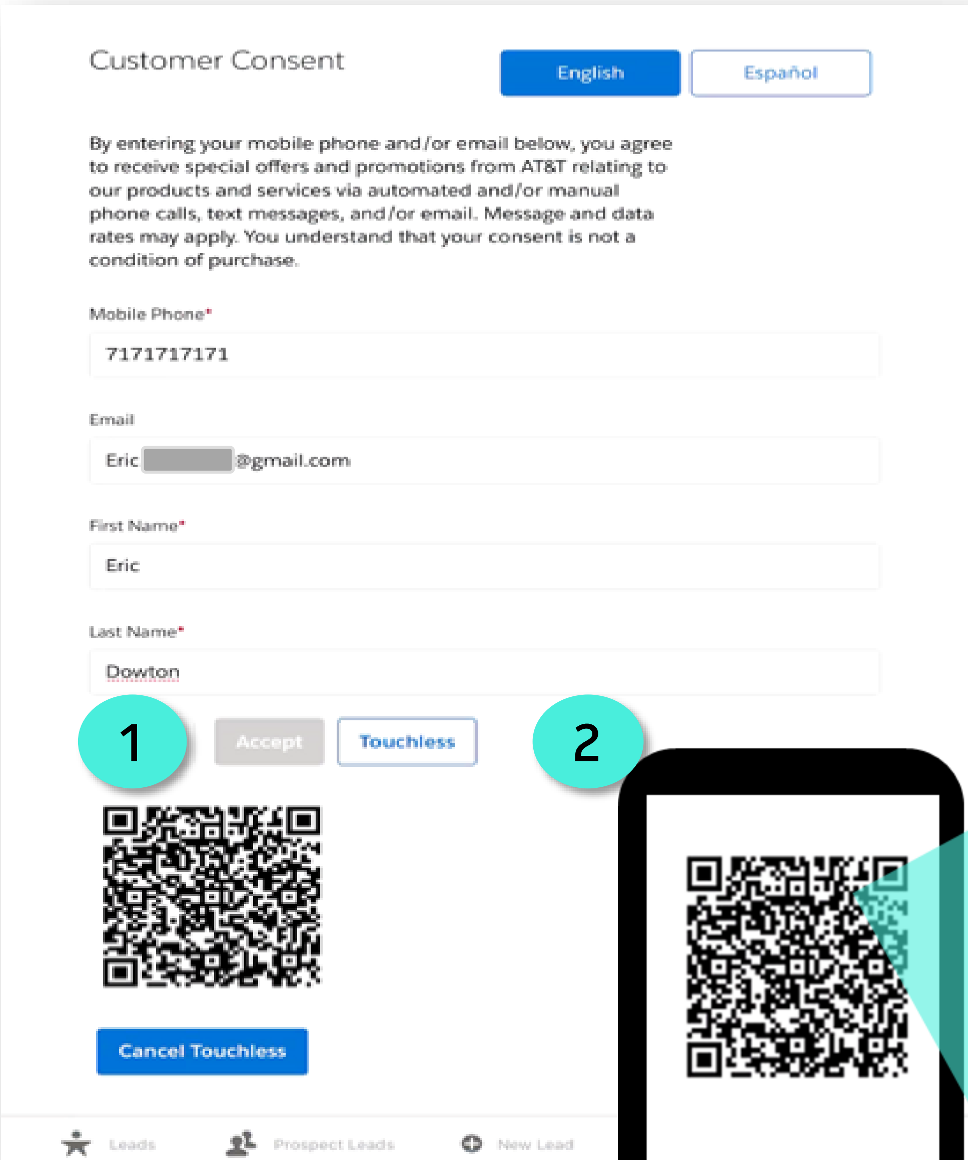


IT'S EASY! Select "New Lead from your Retail home Page **or** from the menu on the bottom from any page

Touchless Consent

Create a seamless and **Touchless Experience** for the customer to provide consent!

TOUCHLESS CONSENT PROCESS



1. Select "Touchless" On the Customer Consent form
2. The Customer Scans the QR Code with their camera and launches the Consent Site
3. The customer clicks "Accept" to provide consent

DONE! You will receive a message that the customer has provided consent and you can now finish entering lead details.

CREATE A NEW LEAD | GAIN CONSENT | MAKE THE CALL | SEND SMS | WHAT RIGHT LOOKS LIKE | EXTEND LEAD EXPIRATION

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

Make the Call

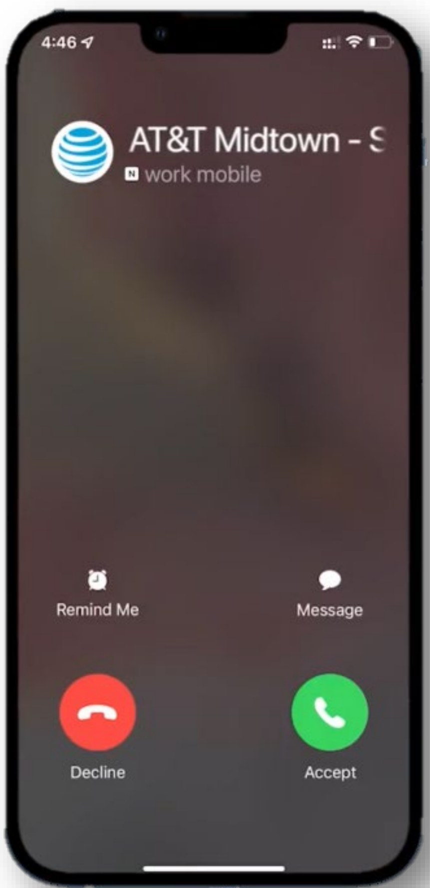
At Your Service

The key to execution in is meeting your commitment by following up with the customer as promised. Here's an example of what it will look like to the customer when you follow up.

BEST PRACTICES

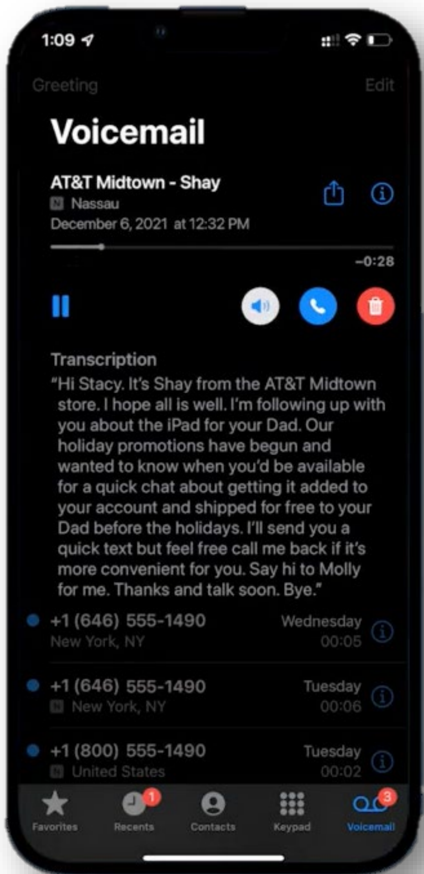
1

Calling works best when following up!



2

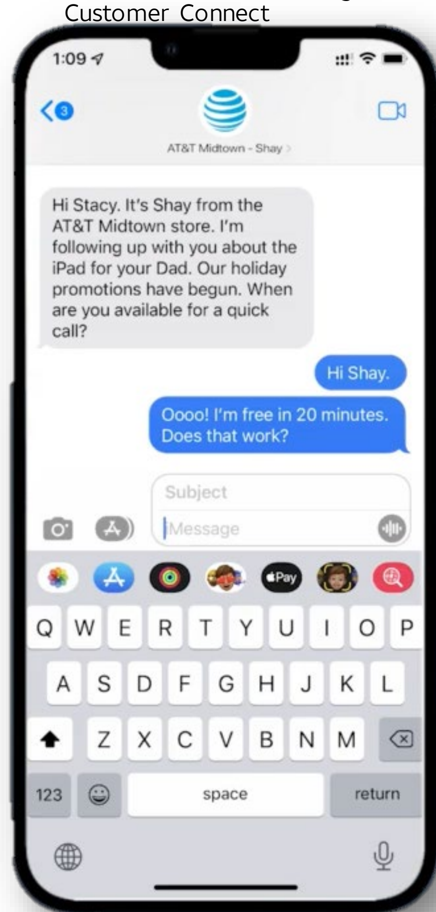
Be Prepared to leave a voicemail!



3

Follow Up with a personalized SMS!

SMS's must be sent through Customer Connect



PRO TIP: Don't forget you are required to Log the Call (See Log a Call in this Playbook for Step by Step) !

Make the Call (cont.)

Leads that are **Called First**, then followed by SMS have the highest closed w/sale rate!

FOLLOW UP BY CALL GUIDELINES & BEST PRACTICES

At Your Service

NOTE: Never authenticate customers or access their account over the phone. Always have the customer return the store to complete the sale.

GREET

- ✓ Introduce yourself by name and store location as a local AT&T expert
- ✓ Clearly state the purpose of your call
- ✓ Be courteous – ensure now is a good time to speak!

UNDERSTAND & RECOMMEND

- ✓ Ask about their current wireless &/or entertainment services and where they live, work and play
- ✓ Make it personal for the customer by recommending a unique voice, data, broadband and video solution that meets their needs
- ✓ Discuss AT&T advantages like Signature & Appreciation offers, HBO max
- ✓ Add value with Unlimited Elite, Next Up, protection, trade-in and accessories

CONFIRM

- ✓ Review personalized solution and ensure every need has been met
- ✓ Confirm customer can and is willing to come into store to close sale
- ✓ Offer Your Online Store Link if customer cannot come into store

PRO TIP: Have the customer add your contact info into their phone so they recognize you!

Make the Call (cont.)

The best way to address customer concerns is to **Acknowledge**, **Empathize** and **Reconfirm**.

COMMON QUESTIONS

How much is my current bill?

The best way to obtain a full view of your bill is log into AT&T.com. For further details I would be happy to provide the number to the AT&T Billing Department at 1-800-881-1468.

Technical or application support.

I would be happy to direct you to the AT&T Technical Support Team. Do you have a pen and paper in case you get disconnected 1-800-288-2020.

OVERCOMING OBJECTIONS

Thanks, but I like what I have…

I understand that you like your current services, and our goal is to provide a service that will meet and exceed your current experience. The advantages of having your services with AT&T are ______. *(make it personal, discuss AT&T Advantages like Signature and appreciation offers, DIRECTV Stream, and our best deals for ALL customers.)*

I need to talk to my spouse.

I completely understand. I would not want to make a decision without my partner either. What objections do you think they might have?

Customer declines/ hesitates

I completely understand. We value you as a customer. May I ask what it is that is holding you back?

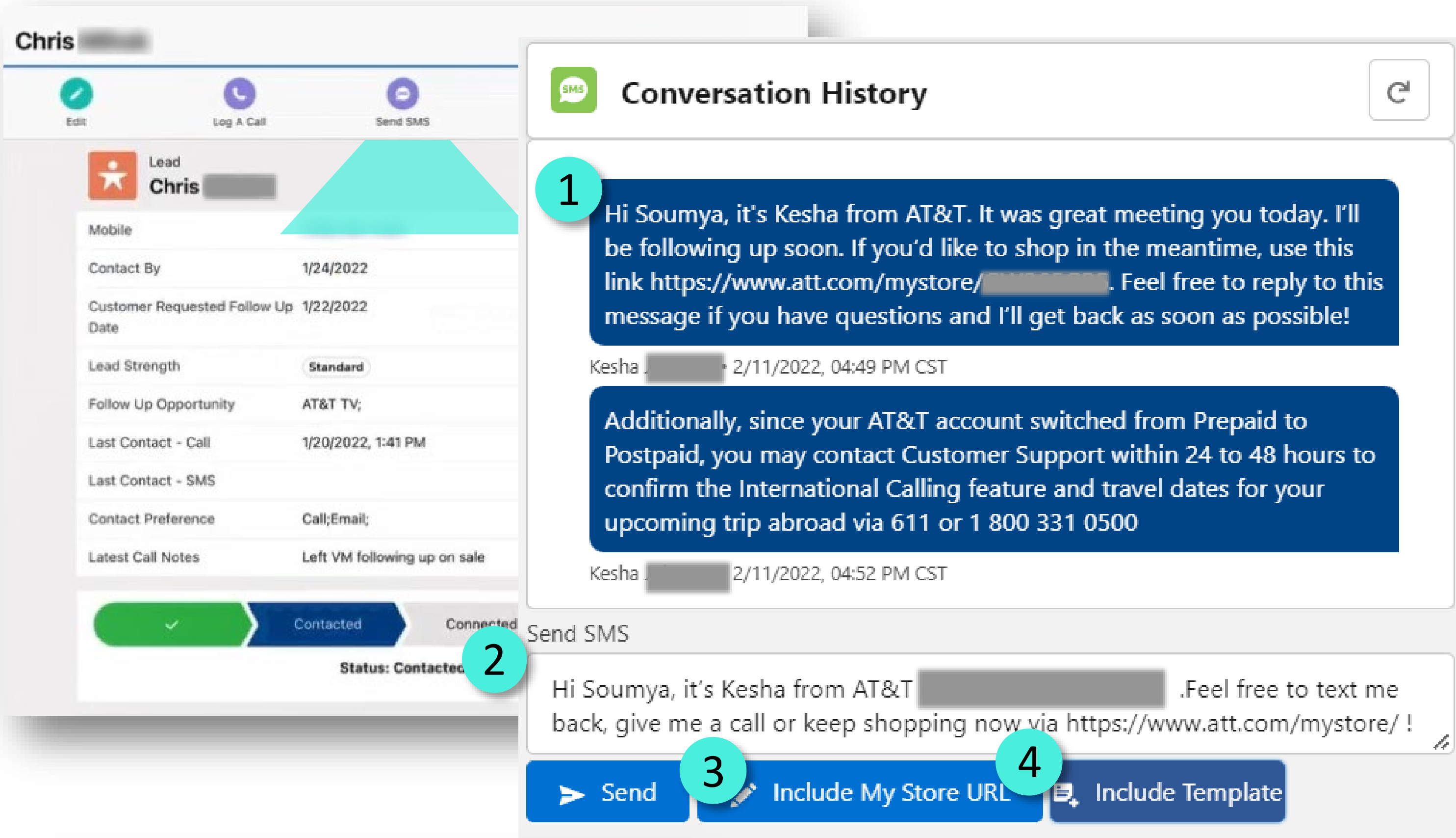
I am too busy right now.

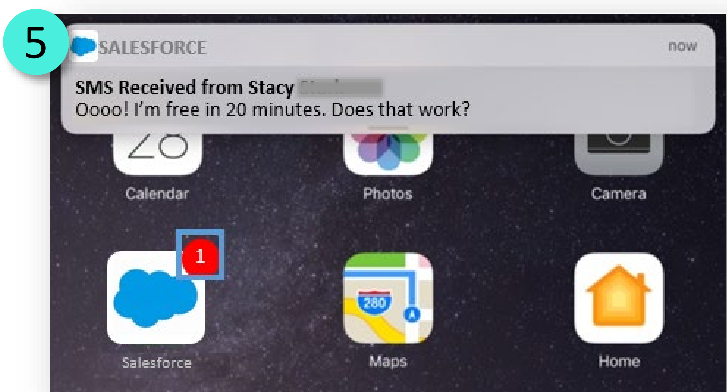
I completely understand. Would you like to schedule some time to come into the store to set up your services?

LEAD MANAGEMENT PLAYBOOK

Sending SMS

Following up via SMS after you left a voicemail for a customer is the best way to incorporate SMS into your follow-up routine!





NOTE! SMSs to customers must be sent via Customer Connect. There is a maximum of 3 messages without a customer response allowed. The customer can also opt-out at any time through the SMS thread.

SMS FEATURES

1. The customer receives a personalized Welcome SMS when the new lead is created
2. You can type up to 480 characters
3. Include your MyStore URL so the customer has the option to purchase through your link!
4. Utilize the "Include Template" feature to save you time!
5. Notifications for SMS received will show on your OPUS Mobile iPad

CREATE A NEW LEAD | GAIN CONSENT | MAKE THE CALL | SEND SMS | WHAT RIGHT LOOKS LIKE | EXTEND LEAD EXPIRATION

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

What Right Looks Like

1 Review Lead notes, SMS and Latest Call Notes (if applicable)

2 Know current promotions & offers

3 Practice your script

MAKING THE CALL

DO

- ✓ Introduce yourself and your store location
- ✓ Make it personal, recommend a unique voice, data, broadband &/or video solution
- ✓ Clearly explain product &/or offer details
- ✓ Lead w/ words like "benefits", "discounts" or "offers"
- ✓ Offer Your Online Store Link if customer cannot come into store

DON'T

- Call before reviewing the lead opportunity details
- Make a recommendation without asking discovery questions
- Ever access accounts or authenticate customers
- Assume the customer knows what you're talking about
- Use words like "deals" or "promos"
- Ever use slang or foul language

PRO TIP! Review 'Notes' section of lead and know current promos & offers prior to making your call!

SENDING THE SMS

DO

- ✓ Personalize your SMS by providing your name & using the customer's name
- ✓ Be concise and professional – check for typos and correct punctuation
- ✓ Stay engaged - respond in real-time when possible
- ✓ Only use Customer Connect to send SMS

DON'T

- Write texts in ALL CAPS or overuse exclamation points
- Include details about specific promotions (w/out all proper T&Cs)
- Use shorthand like "2" for "to" or "U" for "you."
- Ever send SMS from a personal device or outside of the Customer Connect tool

CREATE A NEW LEAD | GAIN CONSENT | MAKE THE CALL | SEND SMS | WHAT RIGHT LOOKS LIKE | EXTEND LEAD EXPIRATION

PLAYBOOK HOME

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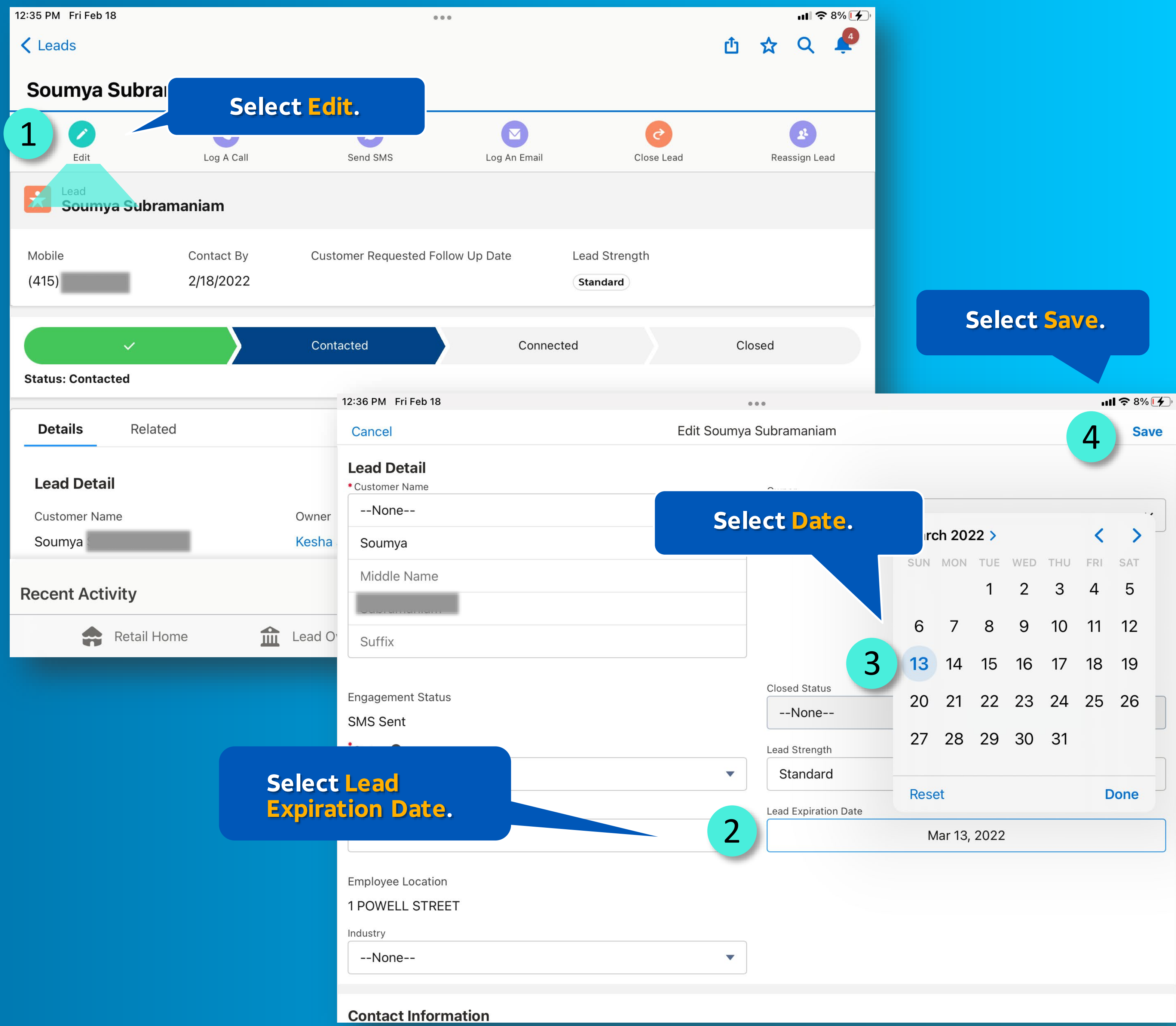
Extend Expiration Date

Customer Interaction Leads will auto-expire after 30 days. If the customer needs more time after making contact, you can extend the lead expiration for up to 30 days.



CREATE A NEW LEAD | GAIN CONSENT | MAKE THE CALL | SEND SMS | WHAT RIGHT LOOKS LIKE | EXTEND LEAD EXPIRATION

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

SMALL BUSINESS

Accelerate CRU Sales with Small Business Campaigns in AT&T Customer Connect Lead Management!

UNASSIGNED LEADS | MAKE THE CALL | REFERRALS TO BiR

PLAYBOOK HOME

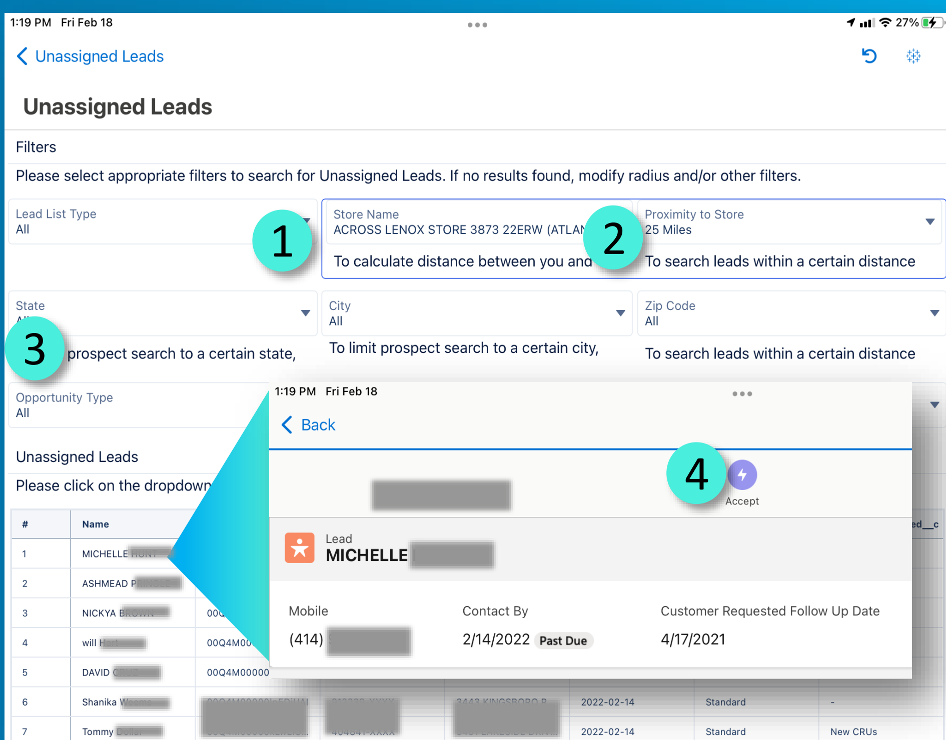
LEAD MANAGEMENT PLAYBOOK

Unassigned Business Leads

Use **Small Business Leads** in Lead Management to **discover opportunities** to serve Small Businesses in your area!

How to "Accept" Unassigned Leads

Users can search available Unassigned Business Leads up to 25 miles to the store location. Once the user "Accepts" the lead, it will then appear in the Small Business Lead List.



1 Search by location

2 Search by distance, City, State and/or Zip Code

3 Filter Opportunity Type

4 Select Lead from List and click "Accept" to view and contact the lead

Lead Lists

- Due Today / Past Due (5)
- Customer Interaction Leads (0)
- Small Business Leads (4)
- Marketing Campaign Leads (0)

NOTE! Once you "Accept" the Lead, you can now view the lead under the "Lead Lists" found on the Lead Overview Page or in the "Leads" tab

VIDEO: Watch Small Business Leads Action Step Experience

UNASSIGNED LEADS

MAKE THE CALL

REFERRALS TO BiR

PLAYBOOK HOME

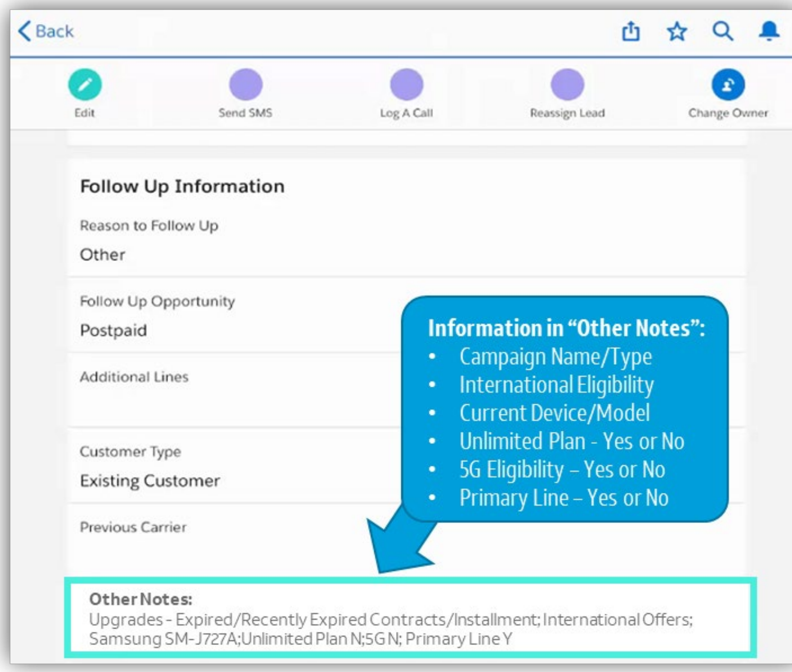
LEAD MANAGEMENT PLAYBOOK

Making the Call

Small Business Leads in Lead Management must be Called first before sending an SMS

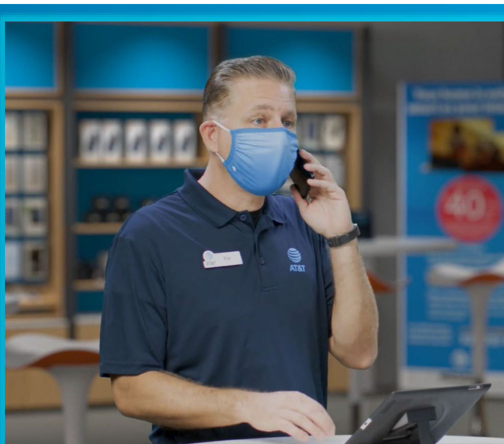
BEST PRACTICES

Before you contact the Small Business lead, you need to review the additional detail provided in the notes section.



Notes will vary by campaign type. Examples of Information include:

- ✓ Campaign Name/Type
- ✓ Follow Up Opportunity
- ✓ Potential Offers
- ✓ FAN Number



SMALL BUSINESS CAMPAIGNS GUIDE ON KM

- ✓ Call/Voicemail/SMS Scripts
- ✓ AT&T Benefits
- ✓ Overcoming Objections

Link to Campaign Guides on Knowledge Management

PRO TIP: Always smile when you make calls so you sound friendly and courteous!

LEAD MANAGEMENT PLAYBOOK

Referrals to BiR

Use **Customer Connect** to Send Leads to the location's **BiR seller**

WHEN TO SEND LEADS TO Business in Retail (BiR)?

Every retail location has a BiR Seller. Refer to Management if you do not know who your BiR Seller is.

Is the customer serviceable in Retail?

- NO → Transfer to BiR
- YES → Does the store need assistance closing?
  - NO → Complete in store.
  - YES → Transfer to BiR
- YES → Is it a complex business with unique needs?
  - YES → Transfer to BiR

GUIDE: Retail Referrals to BiR Guide (Desktop Link)

HOW TO TRANSFER LEAD TO BiR SELLER

Set Proper Expectations

- ✓ BiR receives lead the next business day
- ✓ BiR seller reaches out to customer within 24 hours after receiving lead

NOTE! Transfer to Video Business Seller does not send the lead to BiR but to a Business Video Seller. Check with your management for additional details.

PRO TIP: When the Sale is Closed, the BiR seller will order with your dealer code!

UNASSIGNED LEADS | MAKE THE CALL | REFERRALS TO BiR

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MARKETING LEADS

Win Local with Marketing Campaigns in AT&T Customer Connect (select availability)

LOCATING LEADS

WHAT RIGHT LOOKS LIKE

CHANGE LEAD OWNERSHIP

PLAYBOOK HOME

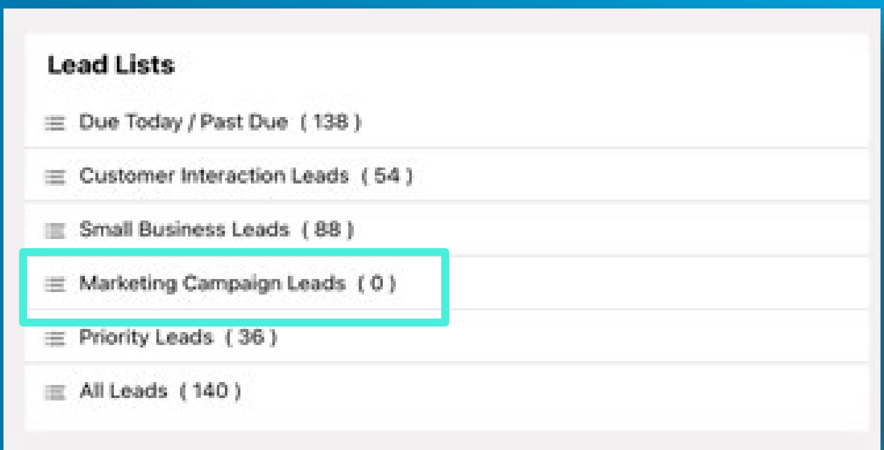
Locating Marketing Leads

(Select Markets and Locations Only)

Consumer **Marketing Campaigns** are existing customers with **Upsell or Cross-Sell opportunities**!

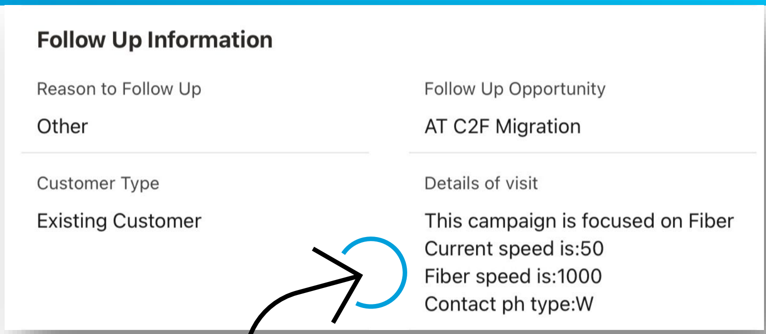
Where To Find Marketing Leads?

Unlike Small Business Leads, Marketing Campaign Leads are assigned to sellers when the campaign launches. Once assigned, the leads will be in the Marketing Lead List.



BEST PRACTICE RECOMMENDATIONS

- Marketing Leads must be Called before SMS function is enabled
- Review the Follow Up Information and Details of Visit prior to the call
- Know your Promos!



NOTE!:

- Never Authenticate a customer over the phone
- Never Access an account over the phone

Check out the "Follow Up Information" section to help you prepare for the call!

PRO TIP: Use them or Lose them! Marketing Campaigns expire after 30 days

LOCATING LEADS | WHAT RIGHT LOOKS LIKE | CHANGE LEAD OWNERSHIP

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

What Right Looks Like

1 **Practice your pitch, then Make the Call!**

2 **Be Prepared to leave a voicemail!**

3 **Follow Up with a personalized SMS!**

Practicing your pitch is important! Below are example scripts for making the call first, leaving a voicemail and sending a follow up SMS through Customer Connect that will help you practice.

PHONE CALL

Hi, _____, this is _____ from AT&T. How are you today? [Acknowledge] . We appreciate you being a valuable part of the AT&T family. I am calling today to let you know that we have some fantastic offers available for [CAMPAIGN TYPE], including deals on DEVICE TYPE PREFERENCE (found in Other Notes: iPhone/Android) for as low as [INTRODUCE THE NATIONAL OFFER] (state the terms of the offer based on device type). Are you interested in this offer?

YES: That's great news! I can set up an appointment for you to come to the store to take advantage of this offer. We have appointments open on _______. Which day would work best for you?
NO: Thank the customer for their time. Ask them if they have any additional questions and offer to review over the phone.

VOICEMAIL

Hi, _____, this is _____ from your local AT&T store at _____. I'm reaching out to let you know that we have fantastic deals available for [CAMPAIGN TYPE]. ! To learn more please call me at [phone number]. I'll also send you a text message in case it's more convenient for you. I look forward to hearing from you!

SMS

Hi ________ , its ____ from the AT&T [street name] store. I'm following up on my voicemail about our great new [CAMPAIGN OFFER] for wireless customers. Text or call me back if you have questions, I'd love to help you! You can also learn more about our new offers here: <insert YOS link>

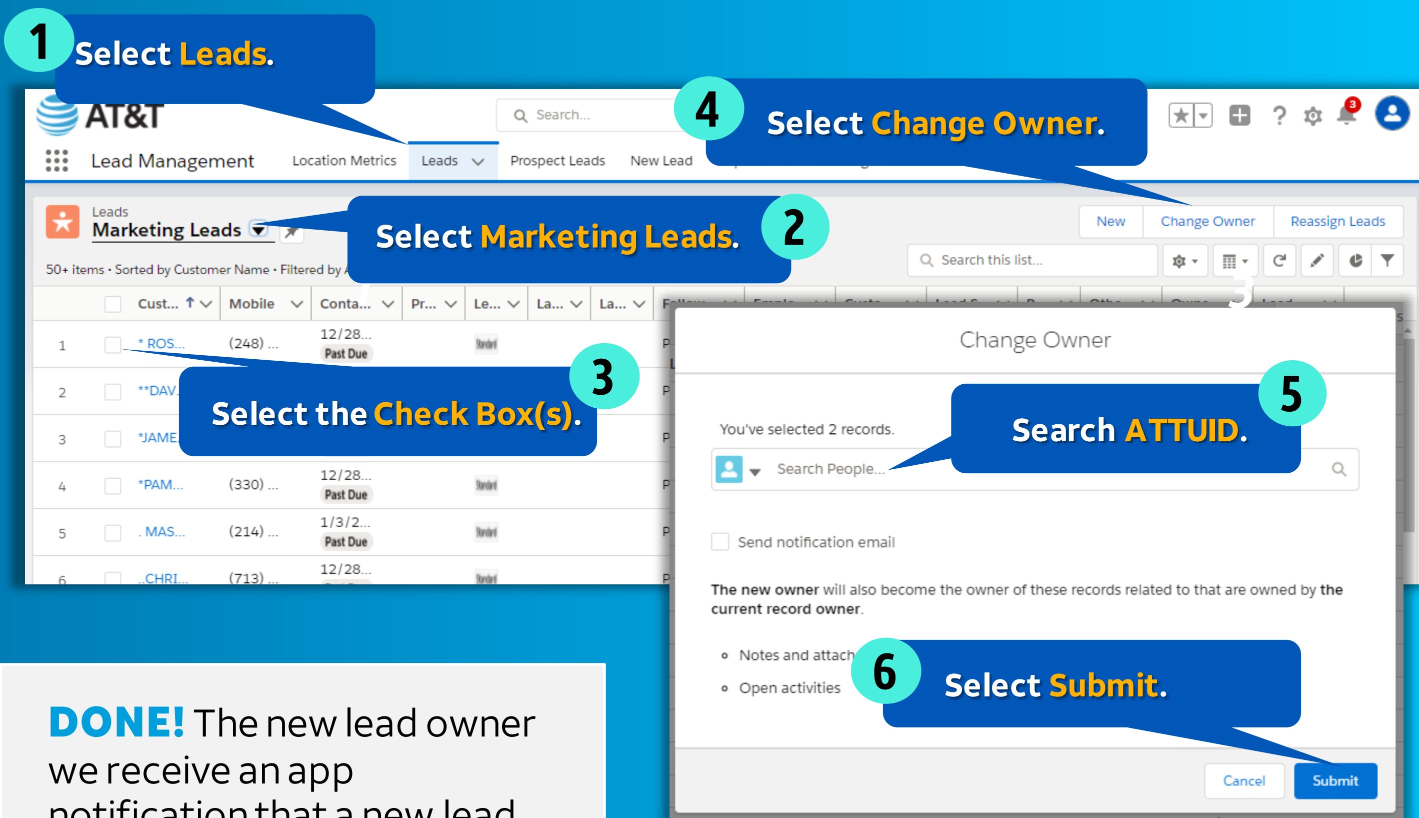
Don't forget to log the call! Once you log the call, the SMS option will be available.

NOTE: Market leadership will provide approved scripts and campaign details prior to launch.

Changing Lead Ownership

(Desktop Experience Only)

Managers have the ability change ownership of lead and assign it to another seller when needed.



DONE! The new lead owner we receive an app notification that a new lead has been assigned to them.

Important: Marketing leads are initially assigned to locations that are in closest proximity to the customer. If changing location of a lead, please consider the distance impact this creates for the potential customer visiting retail.

NOTE: The "Reassign" option will auto-assign the lead to another seller in the location.

LOCATING LEADS

WHAT RIGHT LOOKS LIKE

CHANGE LEAD OWNERSHIP

PLAYBOOK HOME

LEAD MANAGEMENT PLAYBOOK

REPORTING & ANALYTICS

Engage Teams with Reporting and Analytics in Lead Management

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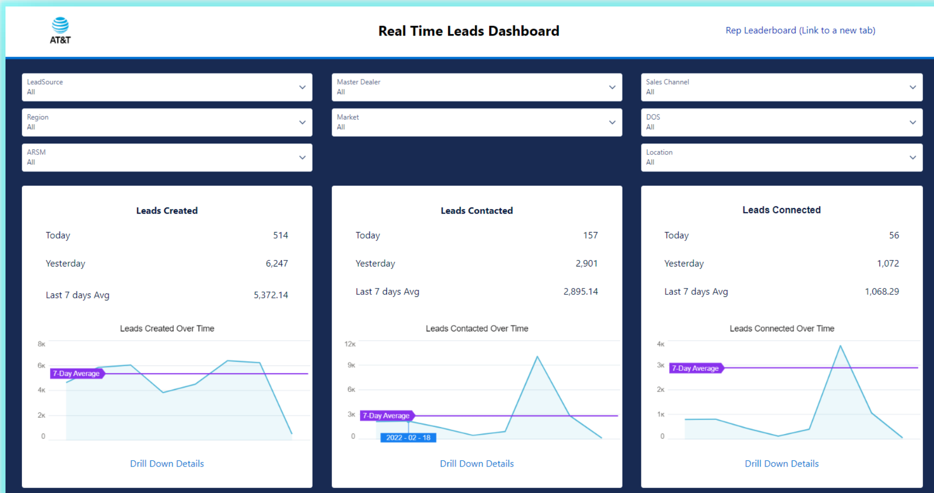
LEAD MANAGEMENT PLAYBOOK

Analytics Dashboards

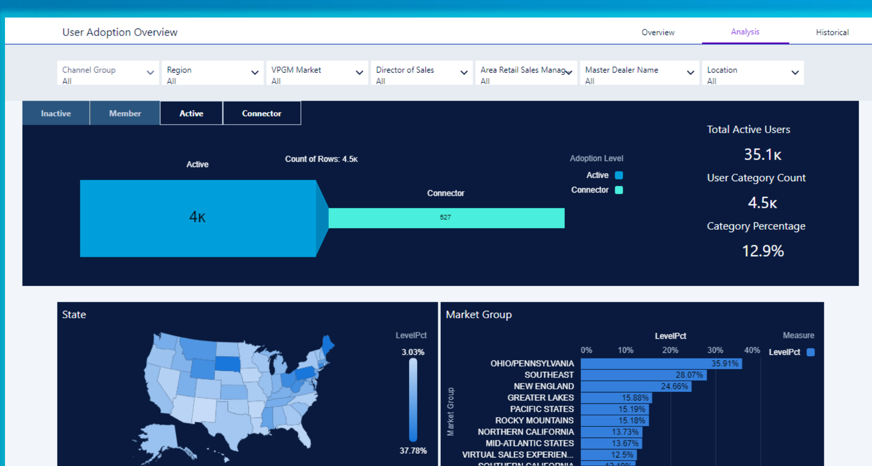
The **Real-Time Leads Dashboard** and **User Adoption Dashboard** have you covered!

REAL-TIME LEADS DASHBOARD

- ✓ Mobile & Desktop Experiences
- ✓ Updated hourly
- ✓ See Today's activity plus historical views
- ✓ Rep Leaderboard
- ✓ Drilldown details
- ✓ Exportable Data



USER ADOPTION DASHBOARD



- ✓ Mobile & Experiences
- ✓ Updated Daily
- ✓ Categorizes Users based off utilization
- ✓ Includes AR Sellers and Managers
- ✓ Drilldown details
- ✓ Exportable Data

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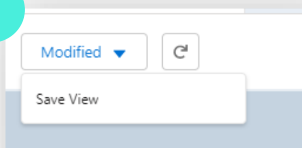
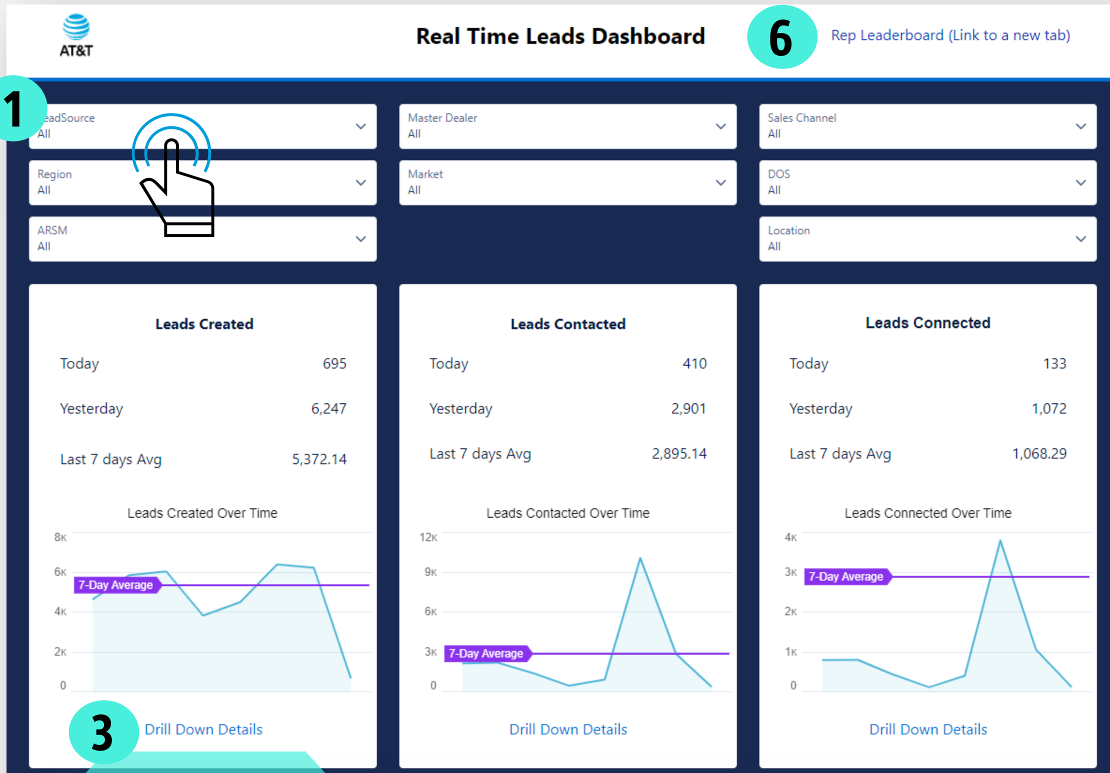
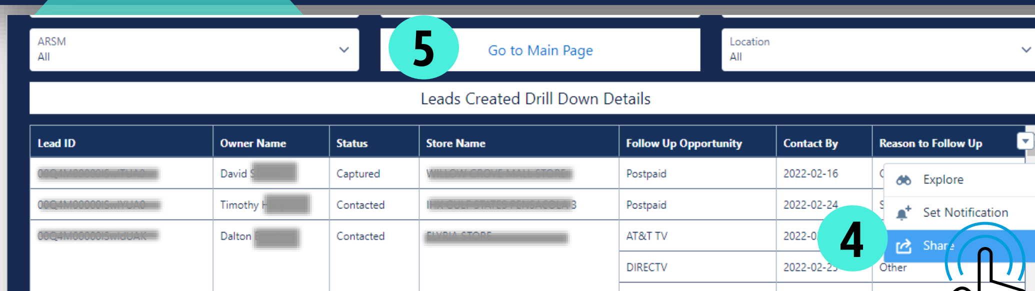
Real Time Leads Dashboard

Your One-Stop Shop for **Real-Time Lead Creations & Contacts, Historical Views** and a **Rep Leaderboard!**







1 Select your filters

2 Save your modified filters. (Desktop only)

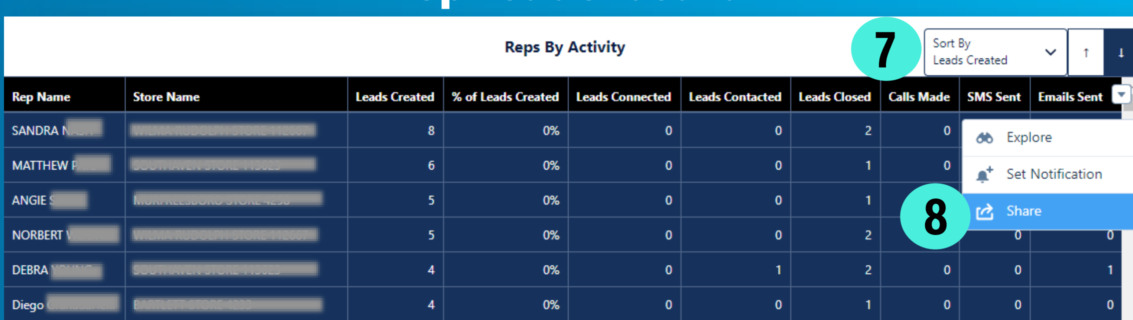
3 Drilldown details

4 Export by selecting "Share"

5 Go back to Main Page

6 Go to Rep Leaderboard

Rep Leaderboard



7 Select how you would like to sort. By metric, ascending or descending

8 Export by selecting "Share" (Desktop only)

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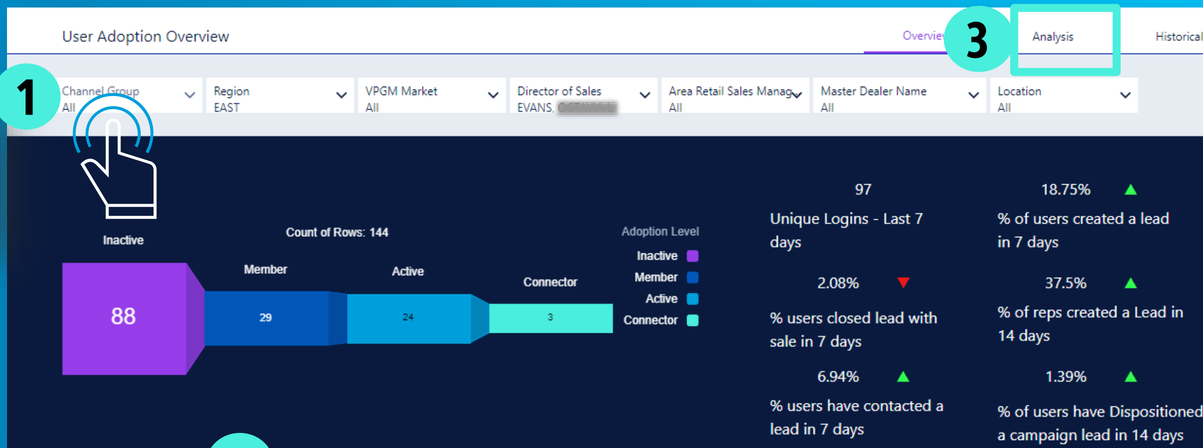
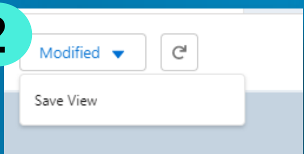
User Adoption Dashboard

Adoption % is the percentage of users in both the **Active** & **Connector** Categories!





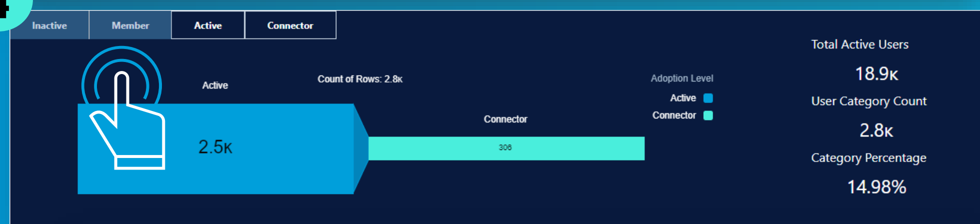
1 Select your filters

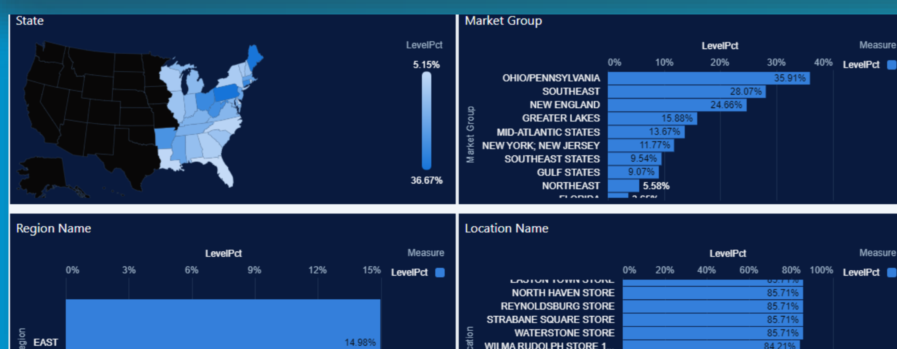
2 Save your modified filters. (Desktop only)

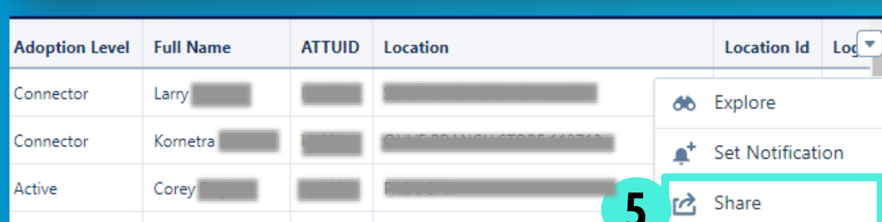
3 Select Analysis for a Deeper Dive

4 Select the categories you would like to view.

5 Export the detailed table by selecting Share (Desktop Only)







Adoption Level	Full Name	ATTUID	Location	Location Id	Log
Connector	Larry [redacted]	[redacted]	[redacted]		
Connector	Kornetra [redacted]	[redacted]	[redacted]		
Active	Corey [redacted]	[redacted]	[redacted]		

Adoption Category Definitions

Inactive	Member	Active	Connector
User has not created or contacted leads in over 14 days	User created/accepted a lead within the last 14 days	User has created or contacted a lead within the last 7 days	User has contacted 5 leads or created 3 leads in last 5 days with less than 10% past due leads. Closed a lead with sale.

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REAL TIME LEADS DASHBOARD

USER ADOPTION DASHBOARD

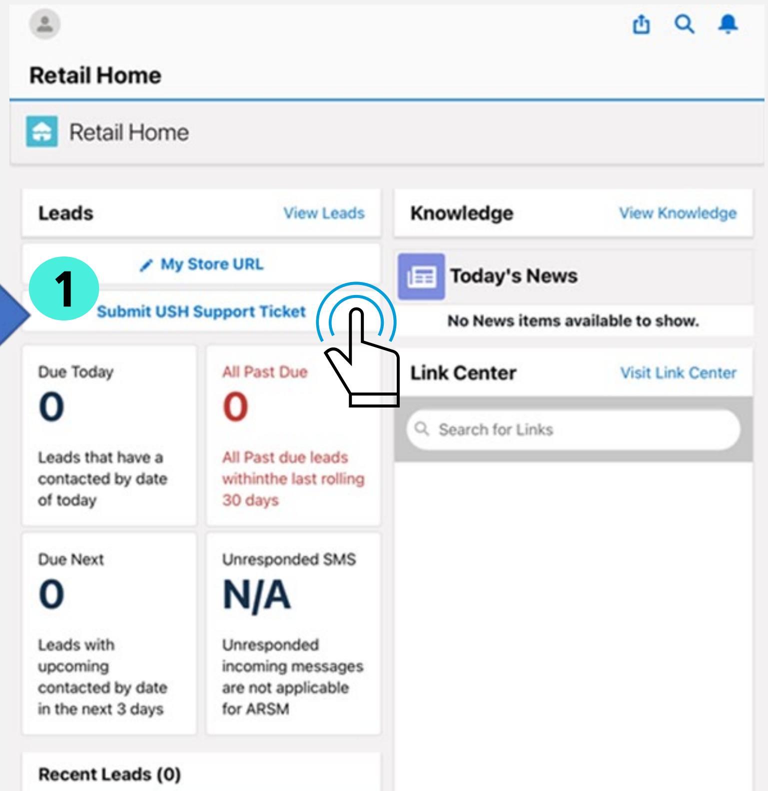
REPORT SYSTEM ISSUES

PLAYBOOK HOME

Report an Issue or Error

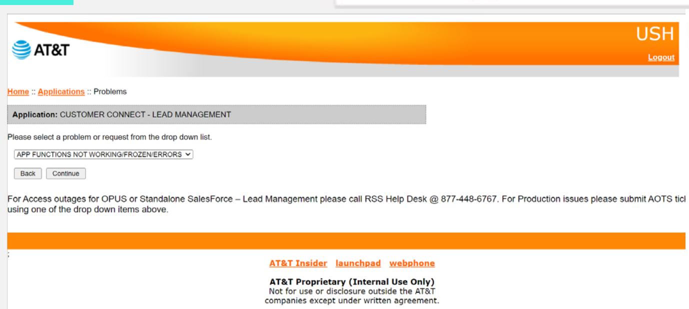
If you are having system issues with Lead Management, **report it! Submit an USH ticket** and provide details with a screenshot!

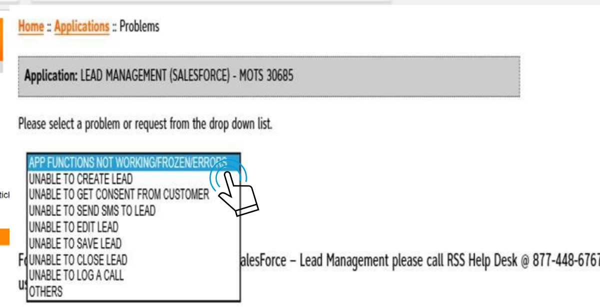
Select 'Submit USH Support Ticket' to report an error!



1 Submit USH Support Ticket

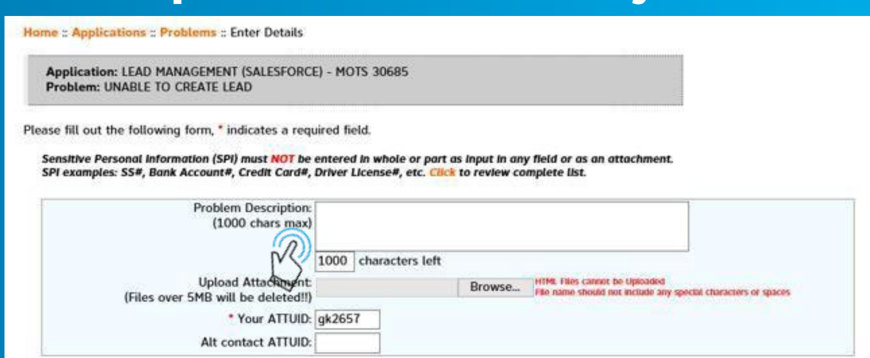
2 Select option that describes your issue. If your issue is not listed, choose "others"





NOTE: Upload a screenshot of your issue

3



3 Enter details of the issue in the Problem Description Box

- ✓ Also include a screenshot of the issue

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