



AT&T Customer Connect

# MANAGEMENT PLAYBOOK

A large, stylized title "MANAGEMENT PLAYBOOK" is overlaid on a blurred background of a modern office interior. The title is in white and blue text. The letters are partially obscured by a blue outline that follows the contours of the words. The background shows desks, computer monitors, and decorative hanging spheres.

# 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

## ANALYTICS & REPORTING

INTRO TO  
DASHBOARDS

REAL TIME LEADS  
DASHBOARD

USER ADOPTION  
DASHBOARD

REPORT SYSTEM  
ISSUES

# HOW TO WIN

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



GAINING  
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MGR

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PAGE

LOG CALL

CLOSE  
LEAD

[PLAYBOOK HOME](#)

# 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

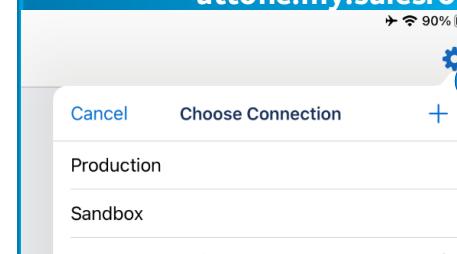
i.e. Viewing Area Metrics, Lead List Views, specific leads, running customer reports

##### 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.

GAINING  
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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 (PLE70011316)**

**Launch Course**

**GAINING  
ACCESS****SELLER****MGR****ARSM****LEAD  
OVERVIEW  
PAGE****LOG CALL****CLOSE  
LEAD****PLAYBOOK HOME**

# How To Win! **Manager**

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

**1**

1 Lead Captured per  
Seller per Day

**2**

80% Contact Rate

**3**

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  
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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!

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# Lead Overview Page

## Easily Manage your Funnel daily!

**1** Lead Overview

Current Location : WEST PLANO

Due Today <b>0</b>	All Past Due <b>2</b> All Past due leads within the last rolling 30 days	Due Next <b>1</b> Leads with upcoming contact by date in the next 3 days	Unresponded SMS <b>0</b> Incoming SMS messages haven't been responded
-----------------------	--------------------------------------------------------------------------------	--------------------------------------------------------------------------------	-----------------------------------------------------------------------------

**2** Leads that have a contacted by date of today

**3** Past Due

**Customer Interaction** Small Business Marketing Campaign All

Sravan West Piano Lead	
Mobile	(444) [redacted]
Owner	Ghassan [redacted]
Follow-Up Opportunity	Prepaid;Postpaid;AT&T Internet;DIRECTV;AT&T TV;Protection
Sales Stage	Contacted
<b>test test</b>	
Mobile	(711) [redacted]
Owner	Ghassan [redacted]
Follow-Up Opportunity	Internet
Sales Stage	Contacted

## 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

## Login and Access Daily

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

**3**

### Rankings by Current Adoption Level

WEST PLANO

This information is based on your Home Store

Seller	Adoption Level
Ghassan Assi	Member
JUSTIN JENKINS	Member
Shawn Burns	Member
Sravan Banka	Member
Alexandria Cannon	Inactive
Darius Williams	Inactive
Dylan Manning	Inactive
Jacolby Ashley	Inactive
Jazper Mabry	Inactive
Jonathan Guevara	Inactive
Kevin Tran	Inactive
NICKOLAS WUNSCHEL	Inactive

### Customer Interaction Leads Created

WEST PLANO

Last Rolling 30 Days

Rank	Seller	#	30 Day Δ
1	Sravan [redacted]	5	-
2	Ghassan [redacted]	3	-
3	JUSTIN [redacted]	2	-

The 30 day Δ was calculated from this reporting period (30days ago to today) and last reporting period(60days ago to 30 days ago)

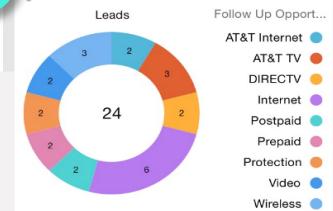
**4**

How to reach 100% : To improve, encourage your reps to login, create leads, and log calls within the app more frequently.

### Leads by Current Status

Captured 102 | Contacted 37 | Connected 1 | Closed 0

### All Open Leads by Product



**5**

### Lead Lists

- ☰ Due Today / Past Due ( 138 )
- ☰ Customer Interaction Leads ( 54 )
- ☰ Small Business Leads ( 88 )
- ☰ Marketing Campaign Leads ( 0 )
- ☰ Priority Leads ( 36 )
- ☰ All Leads ( 140 )

GAINING  
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# Log a Call

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

2:06 PM Thu Feb 24

Leads

MICHELLE MILLER

1 Log A Call

Send SMS

Log An Email

Close Lead

Reassign Lead

Lead MICHELLE MILLER

2:18 PM Thu Feb 24 Cancel Log a call 7 Submit

**REMEMBER:** It is your responsibility to adhere to Federal and State calling restrictions when attempting contact with a lead. Contacting leads on national holidays is prohibited. Employees in AL, KY, LA, MS, RI, SD, UT may only attempt to contact a lead Mon – Sat 10AM – 6PM local time. All other employees are permitted to contact leads between Mon – Sat 9AM – 8PM and Sunday 12PM – 5PM local time. Refer to the Do Not Call restriction article for additional details.

\* Call Type  
Call Made

\* Call Result  
Unavailable - Left Voicemail

Call Date  
Feb 24, 2022 at 1:06 PM

Customer Requested Follow Up Date  
Feb 24, 2022

Call Notes  
type here...

\*Do not write any confidential, derogatory, or Sensitive Personal Information (SPI) about the customer in your notes. This includes data elements such as SSN, DL#, DOB, Credit Card Numbers, etc.

## 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!

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**PLAYBOOK HOME**

# 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

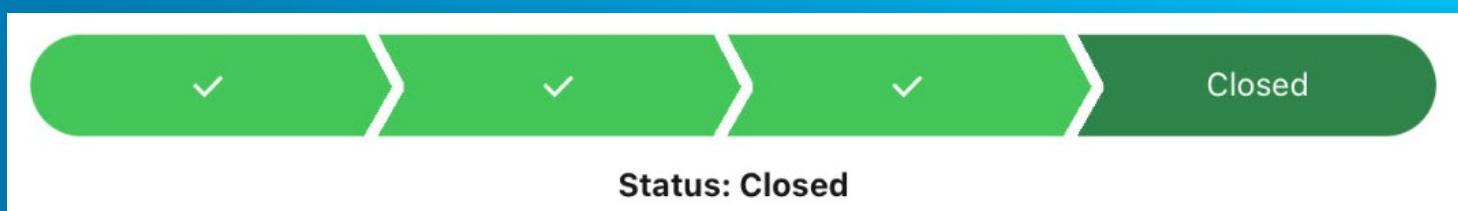
The screenshot shows the software interface for closing a lead named "MICHELLE".

- Step 1:** The "Close Lead" button is highlighted with a red circle containing the number "1".
- Step 2:** The "Status" dropdown menu is open, showing "Closed" as the selected option, with a red circle containing the number "2" next to it.
- Step 3:** The "Billing Account Number" field contains "11122223333", with a red circle containing the number "3" next to it.
- Step 4:** The "Details of visit" section contains the note "Closed fiber sale on 2/23", with a red circle containing the number "4" next to it.
- Step 5:** The "Save" button is highlighted with a red circle containing the number "5".

A note at the bottom of the form reads: "Do not write any confidential, derogatory, or Sensitive Personal Information (SPI) about the customer in your notes. This includes data elements such as SSN, DL#, DOB, Credit Card Numbers, etc."

**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  
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# CUSTOMER INTERACTION **LEADS**



CREATE A  
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WHAT RIGHT  
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**PLAYBOOK HOME**

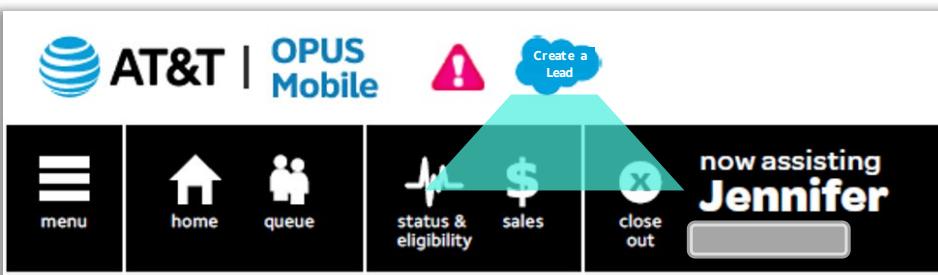
# Create a New Lead

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

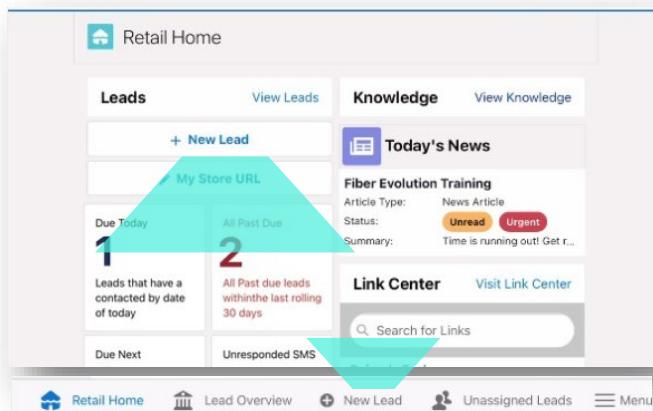
**IT'S EASY!** Once the customer has been authenticated, the cloud icon appears in OPUS. When you select this, the application will open, and you will now be able to complete the new lead form.



**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

**CREATE A  
NEW LEAD**

**GAIN  
CONSENT**

**MAKE THE CALL  
SEND SMS**

**WHAT RIGHT  
LOOKS LIKE**

**EXTEND LEAD  
EXPIRATION**

**PLAYBOOK HOME**

# Touchless Consent

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

## TOUCHLESS CONSENT PROCESS

Customer Consent

English      Español

By entering your mobile phone and/or email below, you agree to receive special offers and promotions from AT&T relating to our products and services via automated and/or manual phone calls, text messages, and/or email. Message and data rates may apply. You understand that your consent is not a condition of purchase.

Mobile Phone\*  
7171717171

Email  
Eric [REDACTED]@gmail.com

First Name\*  
Eric

Last Name\*  
Downton

1      Accept      Touchless

Cancel Touchless

Leads      Prospect Leads      New Lead

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

- 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



**CREATE A  
NEW LEAD**

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CONSENT**

**MAKE THE CALL  
SEND SMS**

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**PLAYBOOK HOME**

# Make the Call

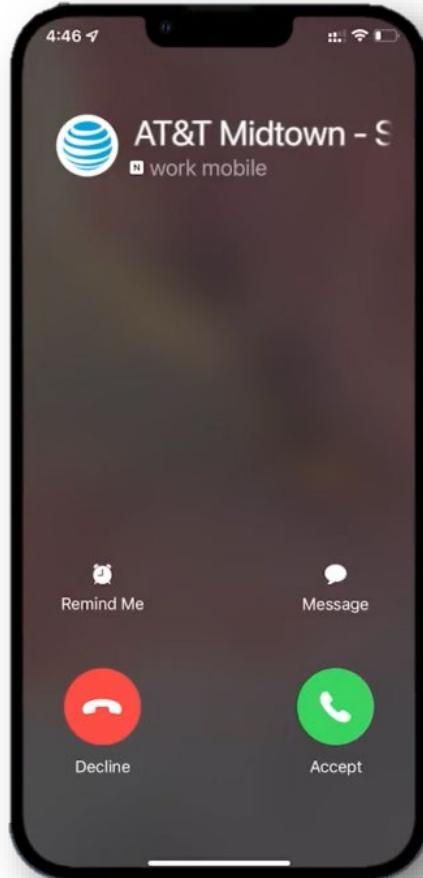
## At Your Service

The key to execution 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

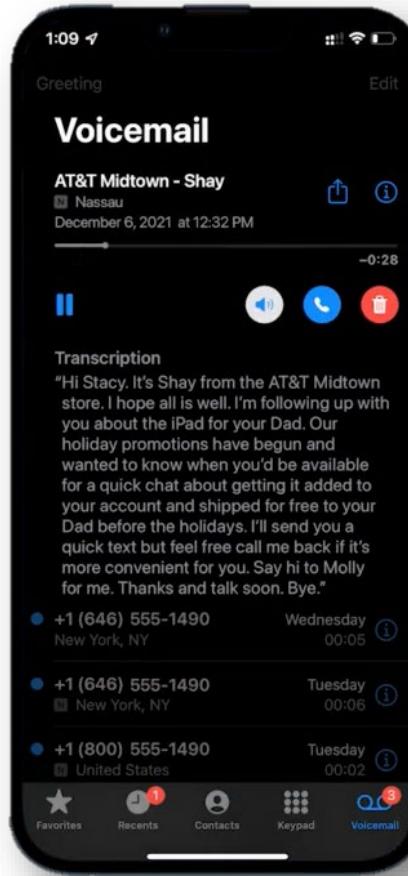
**1**

**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)!

**CREATE A NEW LEAD**

**GAIN CONSENT**

**MAKE THE CALL  
SEND SMS**

**WHAT RIGHT LOOKS LIKE**

**EXTEND LEAD EXPIRATION**

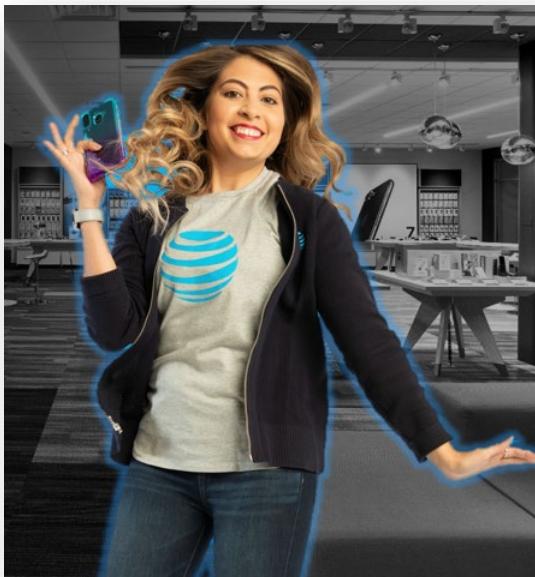
**PLAYBOOK HOME**

# 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!

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**PLAYBOOK HOME**

# 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, DIRECTVStream, 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?

**CREATE A NEW LEAD**

**GAIN CONSENT**

**MAKE THE CALL  
SEND SMS**

**WHAT RIGHT LOOKS LIKE**

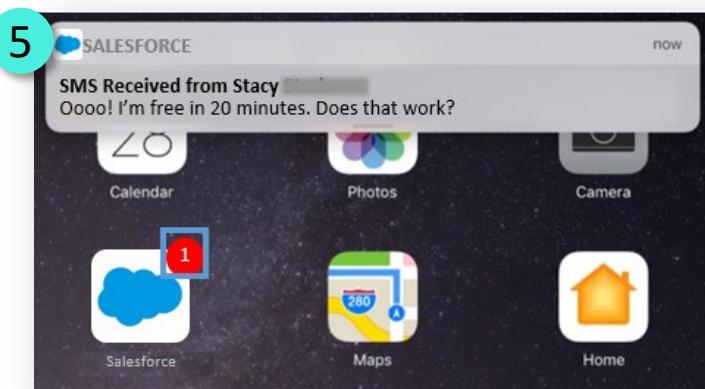
**EXTEND LEAD EXPIRATION**

**PLAYBOOK HOME**

# 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!

The screenshot shows the Lead Management Playbook interface. On the left, a lead profile for "Chris" is displayed with fields like "Mobile", "Contact By", "Customer Requested Follow Up Date", "Lead Strength", "Follow Up Opportunity", "Last Contact - Call", "Last Contact - SMS", "Contact Preference", and "Latest Call Notes". Below this is a status bar with "Contacted" and "Connected" buttons, and a note "Status: Contacted". On the right, a "Conversation History" section shows a message from "Kesha" to "Soumya" dated 2/11/2022, 04:49 PM CST. The message content is highlighted with a blue box. Below it is another message from "Kesha" dated 2/11/2022, 04:52 PM CST. At the bottom of the conversation history is a "Send SMS" button with options: "Send", "Include My Store URL", and "Include Template".



**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  
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**PLAYBOOK HOME**

# 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

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**PLAYBOOK HOME**

# 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.

1 Select Edit.

2 Select Date.

3 Select Lead Expiration Date.

4 Select Save.

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**PLAYBOOK HOME**

# SMALL BUSINESS

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



UNASSIGNED LEADS

MAKE THE CALL

REFERRALS TO BiR

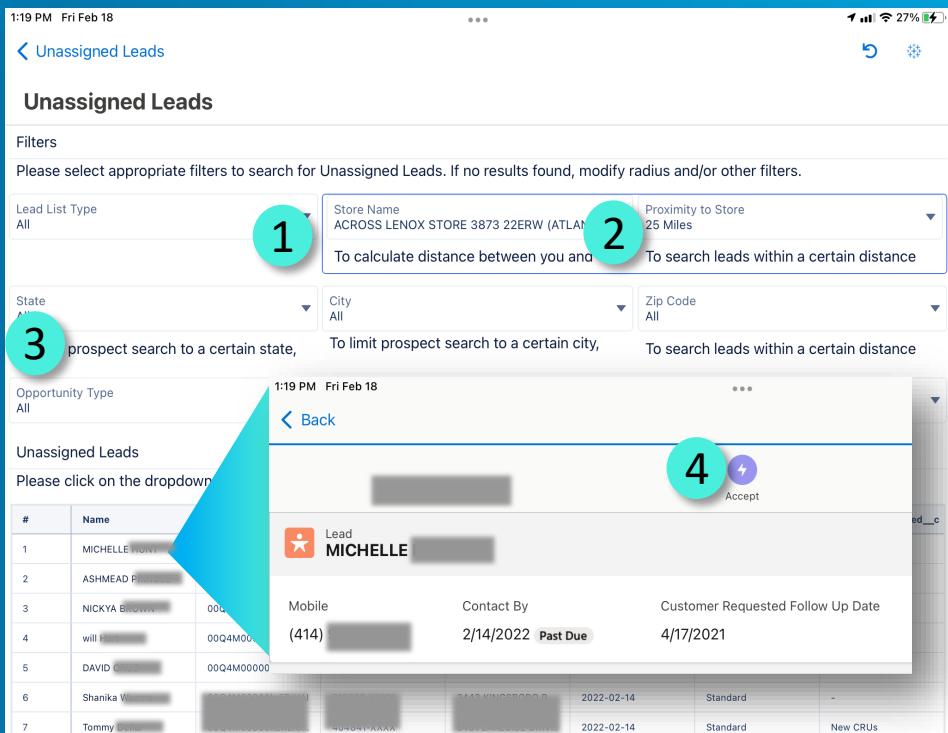
[PLAYBOOK HOME](#)

# Unassigned Business Leads

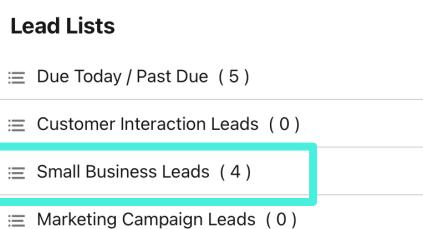
Use **Small Business Leads** in Lead Management to **discover opportunities** to serve Small Businesses in your area!

## 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



**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**

# Making the Call

## Small Business Leads in Lead

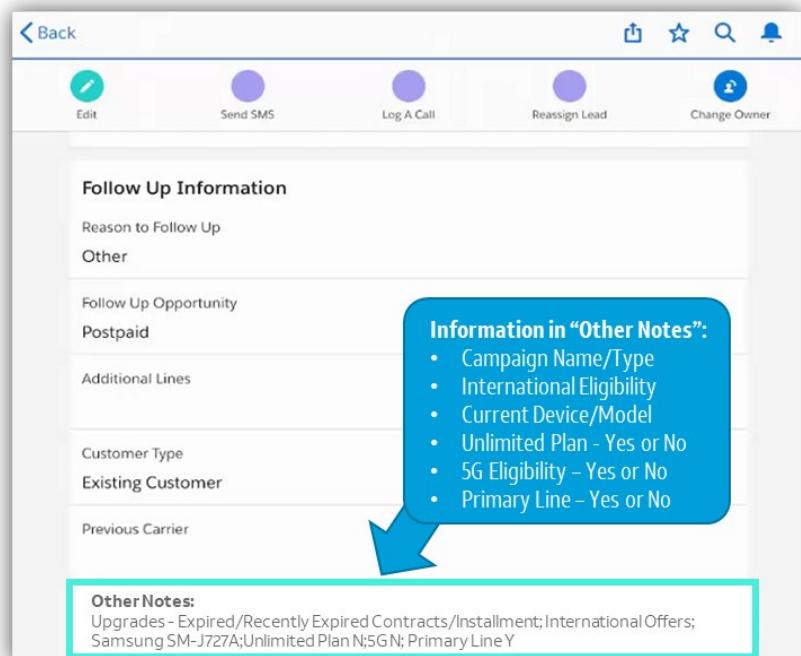
Management must be Called first before sending an SMS

## 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!

UNASSIGNED LEADS

MAKE THE CALL

REFERRALS TO BiR

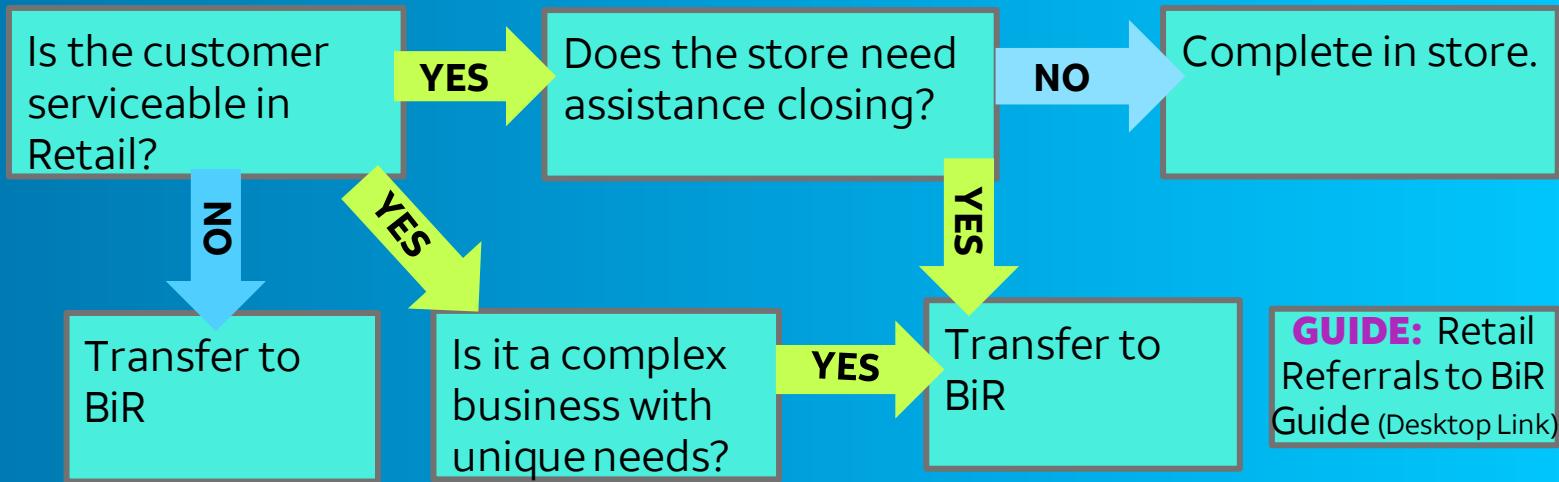
[PLAYBOOK HOME](#)

# Referrals to BiR

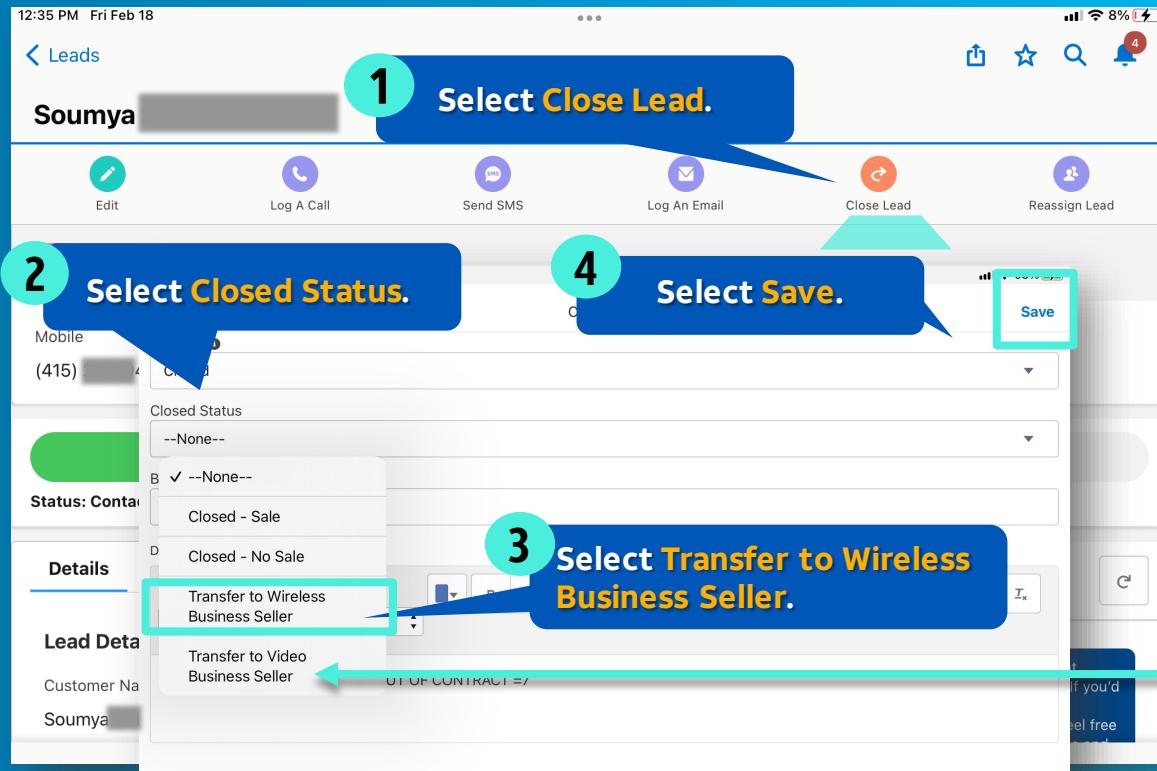
Use **Customer Connect** to Send Leads to the location's **BiR seller**

## 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.



## 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

PLAYBOOK HOME

**LEAD**  
MANAGEMENT  
**PLAYBOOK**

# 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**

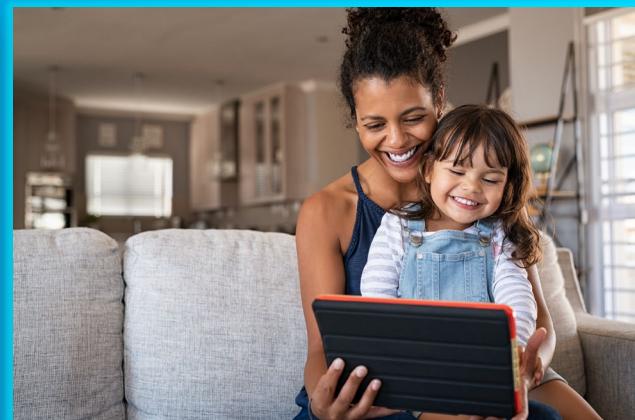
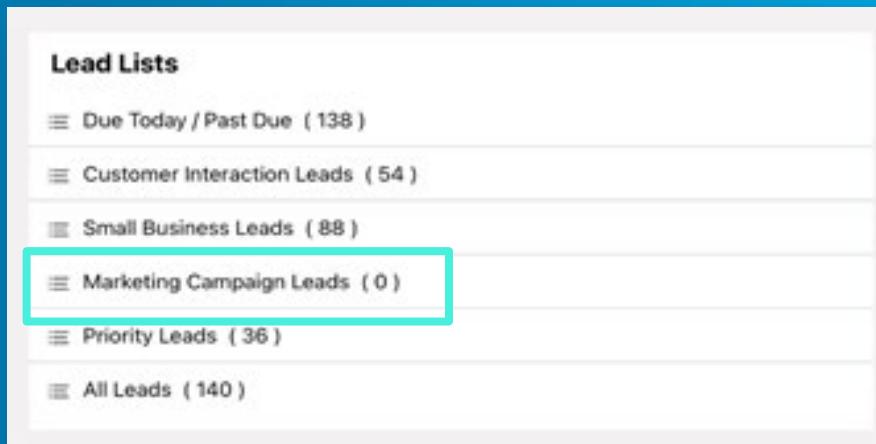
# Locating Marketing Leads

(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

**Follow Up Information**

Reason to Follow Up

Other

Follow Up Opportunity

AT C2F Migration

Customer Type

Existing Customer

Details of visit

This campaign is focused on Fiber  
Current speed is:50  
Fiber speed is:1000  
Contact ph type:W

**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**

# What Right Looks Like

1

2

3

**Practice your pitch,  
then Make the Call!****Be Prepared to  
leave a voicemail!****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.

**LOCATING LEADS****WHAT RIGHT LOOKS LIKE****CHANGE LEAD OWNERSHIP****PLAYBOOK HOME**

# Changing Lead Ownership

(Desktop Experience Only)

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

The screenshot shows the AT&T Lead Management interface. A blue callout numbered 1 points to the 'Leads' tab in the top navigation bar. A blue callout numbered 2 points to the 'Marketing Leads' filter dropdown in the left sidebar. A blue callout numbered 3 points to the checkbox area where leads are selected. A blue callout numbered 4 points to the 'Change Owner' button in the top right of the main window. A blue callout numbered 5 points to the search bar in the 'Change Owner' dialog. A blue callout numbered 6 points to the 'Submit' button in the 'Change Owner' dialog. The main window displays a list of leads with columns for Customer Name, Phone Number, Email, and Status (e.g., Past Due). The 'Change Owner' dialog shows the selected leads and a search bar for the new owner's ATTUID.

**1 Select Leads.**

**2 Select Marketing Leads.**

**3 Select the Check Box(s).**

**4 Select Change Owner.**

**5 Search ATTUID.**

**6 Select Submit.**

**DONE!** The new lead owner will 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**

# REPORTING & ANALYTICS

Engage Teams with Reporting and Analytics  
in Lead Management



INTRO TO  
DASHBOARDS

REAL TIME LEADS  
DASHBOARD

USER ADOPTION  
DASHBOARD

REPORT SYSTEM  
ISSUES

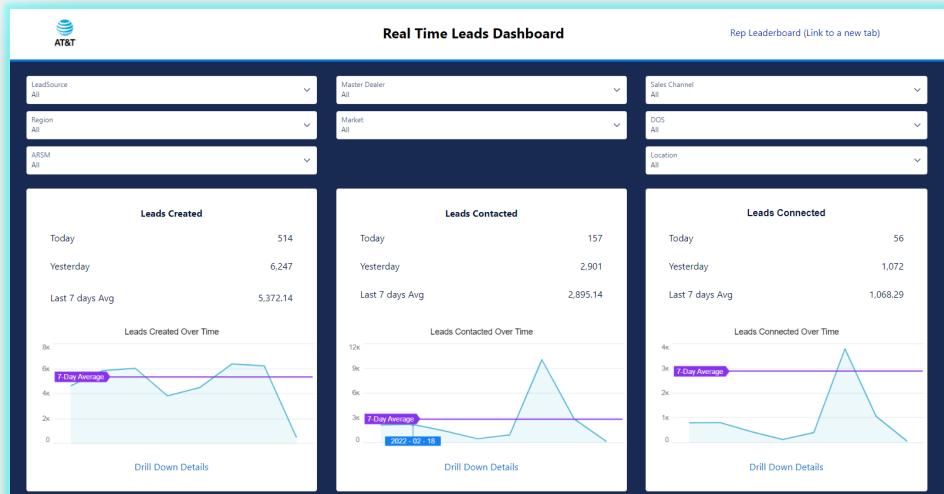
[PLAYBOOK HOME](#)

# Analytics Dashboards

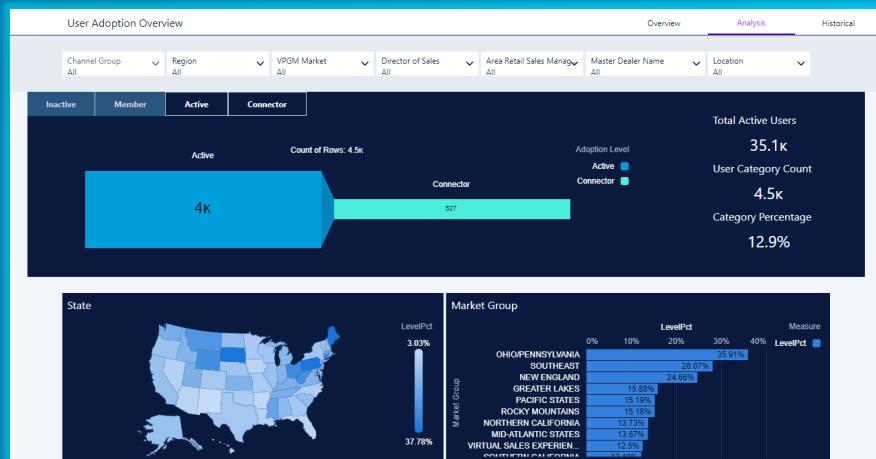
The **Real-Time Leads Dashboard** and **User Adoption Dashboard** have you covered!

## 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

INTRO TO  
DASHBOARDS

REAL TIME LEADS  
DASHBOARD

USER ADOPTION  
DASHBOARD

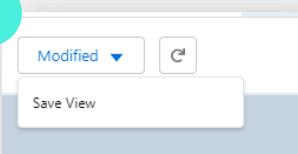
REPORT SYSTEM  
ISSUES

**PLAYBOOK HOME**

# Real Time Leads Dashboard

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

2



1 Select your filters

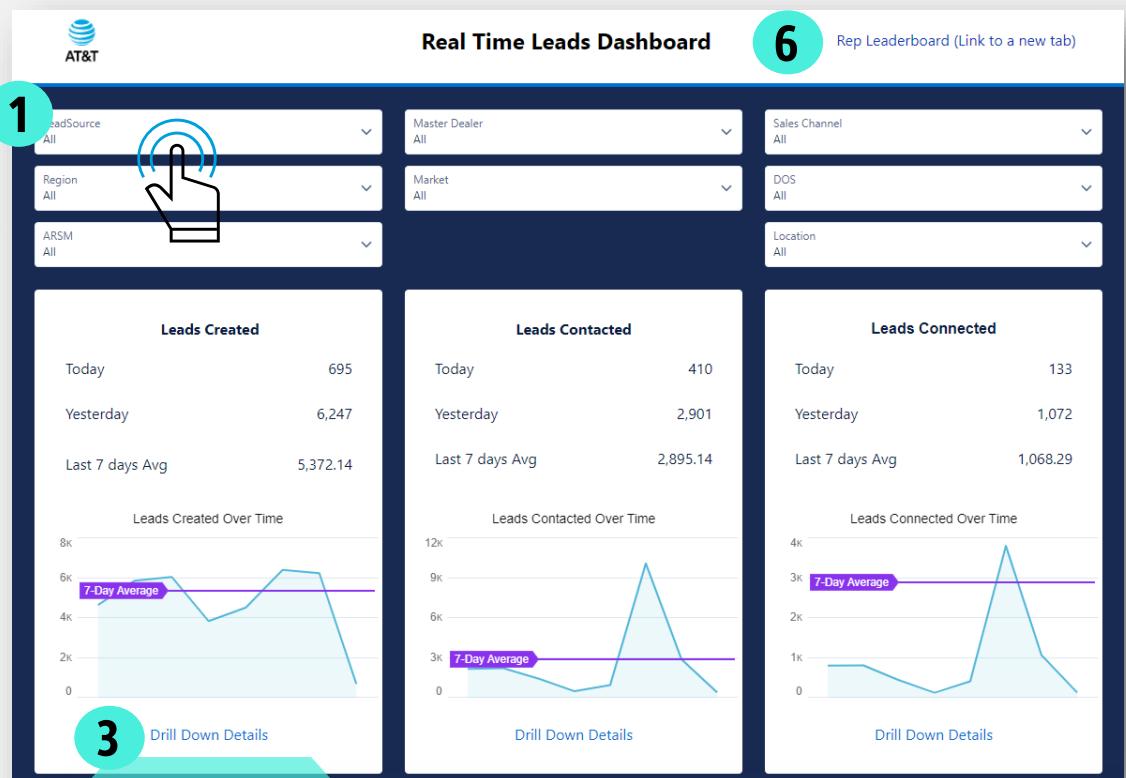
2 Save your modified filters. (Desktop only)

3 Drilldown details

4 Export by selecting "Share"

5 Go back to Main Page

6 Go to Rep Leaderboard



ARSM All		Location All			
Leads Created Drill Down Details					
Go to Main Page					
Lead ID	Owner Name	Status	Store Name		
00Q4M10000001SWIJUAN	David S.	Captured	WILMINGTON STORE		
00Q4M10000001SWIJUAN	Timothy H.	Contacted	WILMINGTON STORE		
00Q4M10000001SWIJUAN	Dalton L.	Contacted	EVANSTON STORE		

4 Share

## Rep Leaderboard

Reps By Activity								
Rep Name	Store Name	Leads Created	% of Leads Created	Leads Connected	Leads Contacted	Leads Closed	Calls Made	SMS Sent
SANDRA N.	WILMINGTON STORE	8	0%	0	0	2	0	
MATTHEW P.	SOUTHWEST STORE	6	0%	0	0	1	0	
ANGIE S.	MAIN READING STORE	5	0%	0	0	1		
NORBERT V.	WILMINGTON STORE	5	0%	0	0	2	0	0
DEBRA V.	SOUTHWEST STORE	4	0%	0	1	2	0	0
Diego C.	EVANSTON STORE	4	0%	0	0	1	0	0

7

8

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

8 Export by selecting "Share" (Desktop only)

INTRO TO DASHBOARDS

REAL TIME LEADS DASHBOARD

USER ADOPTION DASHBOARD

REPORT SYSTEM ISSUES

**PLAYBOOK HOME**

# User Adoption Dashboard

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

The dashboard features a top navigation bar with tabs for Overview (selected), Analysis (highlighted with a green border), and Historical. On the left, there's a sidebar with a 'Modified' dropdown, a 'Save View' button, and a large circular callout '1' pointing to a hand icon over a 'Channel Group All' dropdown. The main area has a dark background with various charts and data tables. A large purple cube displays the number '88'. Below it is a horizontal bar chart with segments for Member (purple), Active (blue), and Connector (teal). To the right are several KPIs: Unique Logins - Last 7 days (97, 18.75%), % of users created a lead in 7 days (37.5%, up), % users closed lead with sale in 7 days (2.08%, down), % of reps created a Lead in 14 days (6.94%, up), % users have contacted a lead in 7 days (1.39%, up), and % of users have Dispositioned a campaign lead in 14 days (14.98%). A second circular callout '2' points to a 'Save View' button. A third circular callout '3' points to the 'Analysis' tab. A fourth circular callout '4' points to a bar chart showing Active users (2.5k) and Connector users (306). The bottom section contains four detailed tables: State (map with color-coded adoption levels), Market Group (bar chart of LevelPct for various regions), Region Name (bar chart of LevelPct for East, West, Midwest, South, and Canada), and Location Name (bar chart of LevelPct for various store locations). A fifth circular callout '5' points to a 'Share' button in the bottom right corner.

- 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 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.

INTRO TO DASHBOARDS

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!

**1** Submit USH Support Ticket

**2** Select option that describes your issue. If your issue is not listed, choose “others”

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

1

Leads

Retail Home

Knowledge

Today's News

No News items available to show.

Link Center

Visit Link Center

Search for Links

Due Today	All Past Due
0	0
Leads that have a contact by date of today	All Past due leads within the last rolling 30 days

Due Next	Unresponded SMS
0	N/A
Leads with upcoming contact by date in the next 3 days	Unresponded incoming messages are not applicable for ARSM

Recent Leads (0)

**2**

Home :: Applications :: Problems

Application: CUSTOMER CONNECT - LEAD MANAGEMENT

Please select a problem or request from the drop down list.

APP FUNCTIONS NOT WORKING/FROZEN/ERRORS

Back Continue

For Access outages for OPUS or Standalone Salesforce – Lead Management please call RSS Help Desk @ 877-448-6767. For Production issues please submit AOTS inc using one of the drop down items above.

AT&T Insider | launchpad | webphone

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Not for use or disclosure outside the AT&T companies except under written agreement.

Home :: Applications :: Problems

Application: LEAD MANAGEMENT (SALESFORCE) - MOTS 30685

Please select a problem or request from the drop down list.

APP FUNCTIONS NOT WORKING/FROZEN/ERRORS

UNABLE TO CREATE LEAD  
UNABLE TO GET CONSENT FROM CUSTOMER  
UNABLE TO SEND SMS TO LEAD  
UNABLE TO EDIT LEAD  
UNABLE TO SAVE LEAD  
UNABLE TO CLOSE LEAD  
UNABLE TO LOG A CALL  
OTHERS

salesForce – Lead Management please call RSS Help Desk @ 877-448-6767.

## NOTE: Upload a screenshot of your issue

**3**

Home :: Applications :: Problems :: Enter Details

Application: LEAD MANAGEMENT (SALESFORCE) - MOTS 30685

Problem: UNABLE TO CREATE LEAD

Please fill out the following form. \* indicates a required field.

Sensitive Personal Information (SPI) must **NOT** be entered in whole or part as input in any field or as an attachment. SPI examples: SS#, Bank Account#, Credit Card#, Driver License#, etc. Click to review complete list.

Problem Description: (1000 chars max)

Upload Attachment: (Files over 5MB will be deleted!!)

Your ATTUID: gk2657

Alt contact ATTUID:

**3** Enter details of the issue in the Problem Description Box

- ✓ Also include a screenshot of the issue

INTRO TO DASHBOARDS

REAL TIME LEADS DASHBOARD

USER ADOPTION DASHBOARD

REPORT SYSTEM ISSUES

PLAYBOOK HOME