

Leads360 Small Business Debt 1.5 Workflow

New

- 1st Call: Left Message **Attempting Contact**
- 1st Call: Not Available **Attempting Contact**
- 1st Call: Bad Phone Number **Manager Review**
- 1st Call: Call Back **Contacted**
- Pitched: Follow-Up **Contacted**
- Pitched: Paperwork Out **Paperwork Out**
- Not Qualified – debt, credit, income **Manager Review**
- Bad Lead: COMMENT **Manager Review**
- Not Interested **Manager Review**
- General Comment: None of the above

Attempting Contact

- Call: Left Message
- Call: Not Available
- Contacted: Call Back **Contacted**
- Call: Bad Phone Number **Manager Review**
- Pitched: Follow-Up **Contacted**
- Pitched: Paperwork Out **Contracts Out**
- Not Qualified – debt, credit, income **Manager Review**
- Bad Lead: COMMENT **Manager Review**
- Not Interested **Manager Review**
- General Comment: None of the above

Contacted

- Call: Left Message
- Call: Not Available
- Contacted: Call Back
- Pitched: Follow-Up
- Pitched: Paperwork Out **Paperwork Out**
- Not Qualified – debt, credit, income **Manager Review**
- Bad Lead: COMMENT **Manager Review**
- Not Interested **Manager Review**
- General Comment: None of the above

Paperwork Out

- Call: Left Message
- Call: Not Available
- Contacted: Call Back
- Paperwork Out
- Paperwork in **Application**
- Customer Cancelled **Manager Review**
- General Comment: None of the above

Application

- Call: Left Message
- Call: Not Available
- Contacted: Call Back
- Paperwork In
- Paperwork Complete **Processing**
- Customer Cancelled **Manager Review**
- Not Interested **Manager Review**
- General Comment: None of the above

Processing

- Call: Left Message
- Call: Not Available
- Contacted: Call Back
- Paperwork Complete
- Package submitted for processing
- Proposal Accepted by Lender
- 1st Payment Received **Enrolled**
- 1st Payment NSF **Manager Review**
- Customer Cancelled **Manager Review**
- General Comment: None of the above

Enrolled

- Call: Left Message
- Call: Not Available
- Contacted: Call Back
- 1st Payment Received
- Full Down Payment Received
- Program Complete
- Customer Cancelled **Manager Review**
- Payment NSF **Manager Review**
- General Comment: None of the above

Manager Review

- Archive **Archived**
- Nurture Program **Nurture**
- Return to Vendor **Archived**
- Re-Enrollment **Enrolled**
- Re-Assign **Contacted**
- General Comment: None of the above

Nurture

- Call: Left Message
- Call: Not Available
- Contacted: Call Back **Contacted**
- Contacted: Remain Nurture
- Pitched: Follow-Up **Contacted**
- Pitched: Contract Out **Contracts Out**
- Archive **Archived**
- Bad Lead: Other, COMMENT **Manager Review**
- General Comment: None of the above

Archived

- Re-Assign **Contacted**

LEGEND

- Status**
- Actions**
- Loan Mod Action**
- Status Change**
- Q Quick Action
- Email Campaign: Status-triggered Drip Emails
- Automatic Email on action taken
- Automatic Reminder