BEST PRACTICE WORKFLOW FOR INSURANCE COMPANIES

LEADS360

NEW (TIME-SENSITIVE LEADS)

NEW (IMPORTED LEADS)

CALLED: NO CONTACT	CONTACT ATTEMPT 1
CALLED: BAD LEAD / BAD PHONE #	ARCHIVE
CONTACTED: CALL BACK	CONTACTED BUT NOT QUOTED
CONTACTED: EMAIL	CONTACTED BUT NOT QUOTED
CONTACTED: QUOTED BUT NOT SOLD	QUOTED BUT NOT SOLD
REQUOTE	REQUOTE
POLICY SOLD	POLICY SOLD
DEAD	ARCHIVE
GENERAL COMMENT: DOES NOT CHANGE STATUS	NO STATUS CHANGE

Leads always start in the NEW status and move through the workflow depending on what action is taken.

CONTACT ATTEMPT 1

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	CONTACT ATTEMPT 2

CONTACT ATTEMPT 2

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	CONTACNT ATEMPT 3

CONTACT ATTEMPT 3

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	CONTACNT ATTEMPT 4

CONTACT ATTEMPT 4

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	CONTACNT ATTEMPT 5

CONTACT ATTEMPT 5

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	CONTACNT ATTEMPT 6

CONTACT ATTEMPT 6

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	ARCHIVE

CONTACTED BUT NOT QUOTED

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	NO STATUS CHANGE
CALLED: CALL BACK	NO STATUS CHANGE
FINAL CALL ATTEMPT	DEAD

QUOTED BUT NOT SOLD

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	NO STATUS CHANGE
CALLED: CALL BACK	NO STATUS CHANGE
FINAL CALL ATTEMPT	DEAD

POLICY SOLD

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	NO STATUS CHANGE
FINAL CALL ATTEMPT	DEAD

REQUOTE

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	NO STATUS CHANGE

ARCHIVE

Same actions/triggers as NEW, except:

CALLED: NO CONTACT	NO STATUS CHANGE

Leads should always finish in the POLICY SOLD, REQUOTE OR ARCHIVE status.

LEGEND

STATUS | ACTION | STATUS CHANGE | Drip emails | Instant email