11.3 Leads360 Release Notes

7/15/2011

Advanced Distribution Settings - Performance Based Lead Max Adjustments

Overview

Prior to the 11.3 release, Lead360 has supported distribution of leads based on data contained within a lead. Introducing the concept of Performance Based Distribution will make it possible to dynamically increase or decrease lead maximums based on the following metrics:

- Speed to Contact Attempt
- Speed to Contact
- Contact Rate
- Qualification Rate
- Conversion Rate

The **Performance Based Lead Max Adjustments** will operate on the program level. Administrators may select one of the above referenced metrics from which to dynamically adjust daily lead maximums.

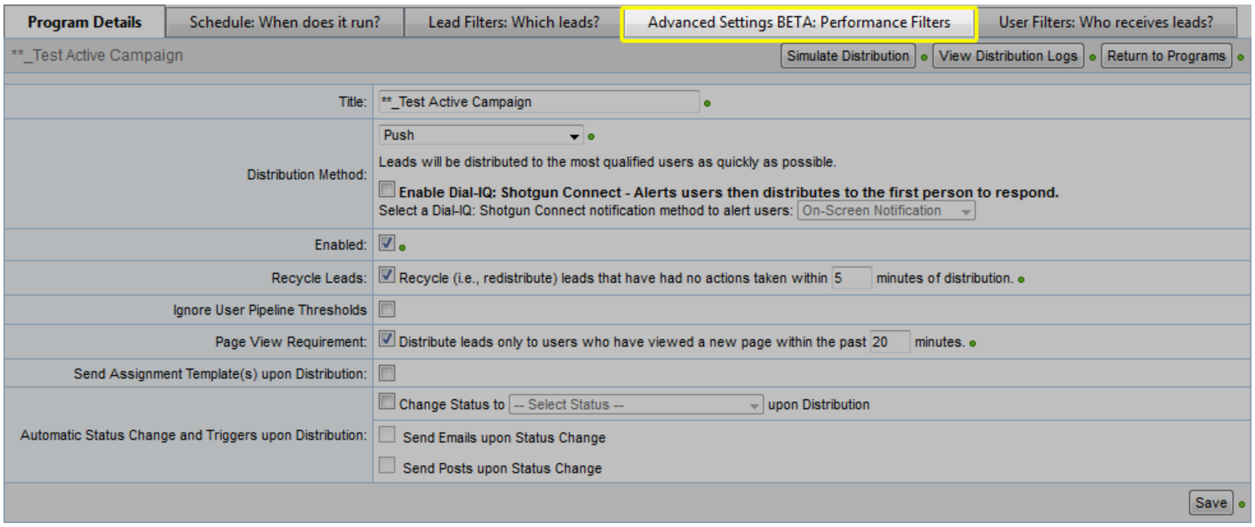
How it works

- An administrator selects the metric he would like to use to for this function, for example, **Speed to Contact Attempt**
- The administrator sets a top threshold which, when exceeded, will increase a user's lead flow by a specified number of leads
- An administrator may also set a bottom threshold which, if the user's metric is below that number, will decrease lead flow by a specified number of leads.
- Before a lead is distributed to a user, the system checks the Performance Metrics setting
- If a user's metric exceeds current top threshold then the user is eligible to receive specified number of additional leads.
- If the user's metric does not meet bottom threshold – The specified penalty is applied

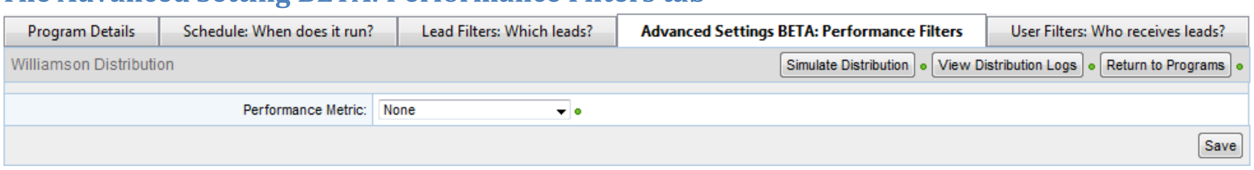
These thresholds are set on the program level and are applied to a single distribution programs. These thresholds are applied ONLY to automated lead distribution. Any manual assignment or batch assignment of leads will ignore this rule.

Configuring Performance Based Lead Max Adjustments

Configure these settings by clicking the **Advanced Setting BETA: Performance Filters** on the Add/Edit Lead Distribution page.



The Advanced Setting BETA: Performance Filters tab

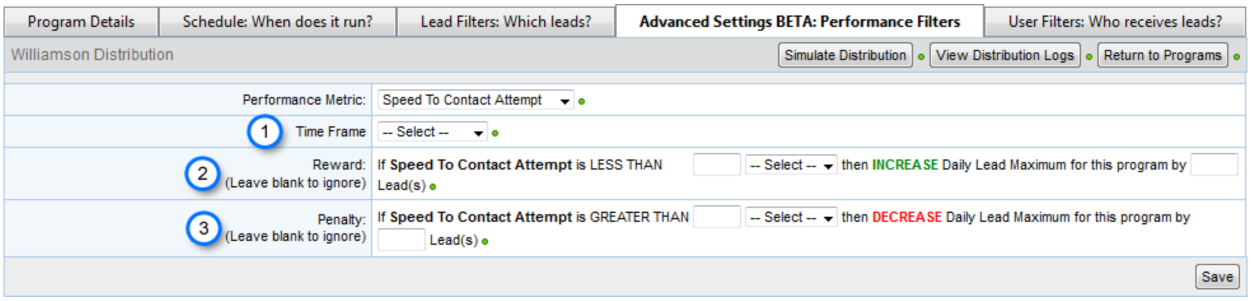


When this tab loads for the first time, i.e., when there have not yet been any Performance Filters applied, the tab will have only one field; Performance Metric. The field will default to the value "None," meaning that

It is possible to choose from the following Performance Metrics:

- Speed to Contact Attempt
- Speed to Contact
- Contact Rate
- Qualification Rate
- Conversion Rate

After selecting a Performance Metric from the dropdown more fields will be displayed.



1. Time Frame - This dropdown includes durations over which the selected performance metric will be calculated.

Available time frame dropdown options include:

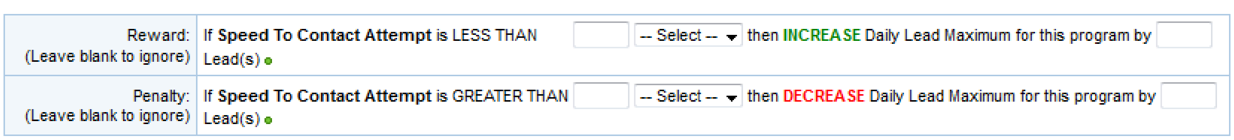
- Last 7 days
- Last 30 days
- Last 60 days
- Last 90 days
- Last 120 days

2. **Reward Rules -** This section allows an administrator to select rules to reward users who exceed the specified performance metric by incrementally increasing the user's daily max leads count. Leave this setting blank to ignore this metric, i.e., give no reward
3. **Penalty Rules** - This section allows an administrator to select rules to penalize users who do not meet the specified performance metric by incrementally increasing the user's daily max leads count. Leave this setting blank to ignore this metric, i.e., give no penalty

Note that different configuration options are displayed based on whether the rules use time based or milestone (percentage based) rules.

Using Time Based Metrics (E.g. Speed to Contact Attempt)

When a time based performance metric (Speed to Contact Attempt or Speed to Contact) is selected in the performance metric dropdown; the additional **Time Frame** and **Reward/Penalty** elements are displayed. Here's how they work.

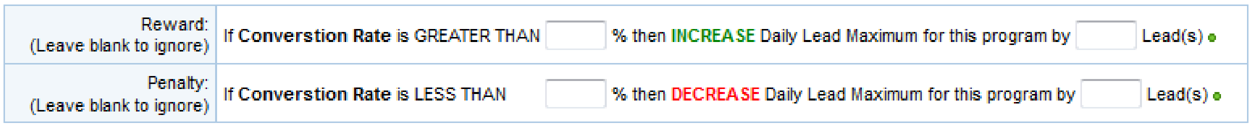


Setting a reward/penalty for a time based metric is done by putting a number in the first field, selecting minutes, hours, or days from the dropdown. This sets the period of time. Then put a number of leads by which to increase or decrease the daily maximum. For example;

Reward: if {Speed to Contact Attempt} is LESS THAN 15 minutes then **INCREASE** Daily Lead Maximum by 2 leads.

Using Milestone (Percentage Based) Metrics (E.g. Conversion Rate)

When a percentage based performance metric (Contact Rate, Qualification Rate or Conversion Rate) is selected in the performance metric dropdown; the additional **Time Frame** and **Reward/Penalty** elements are displayed. Here's how they work.



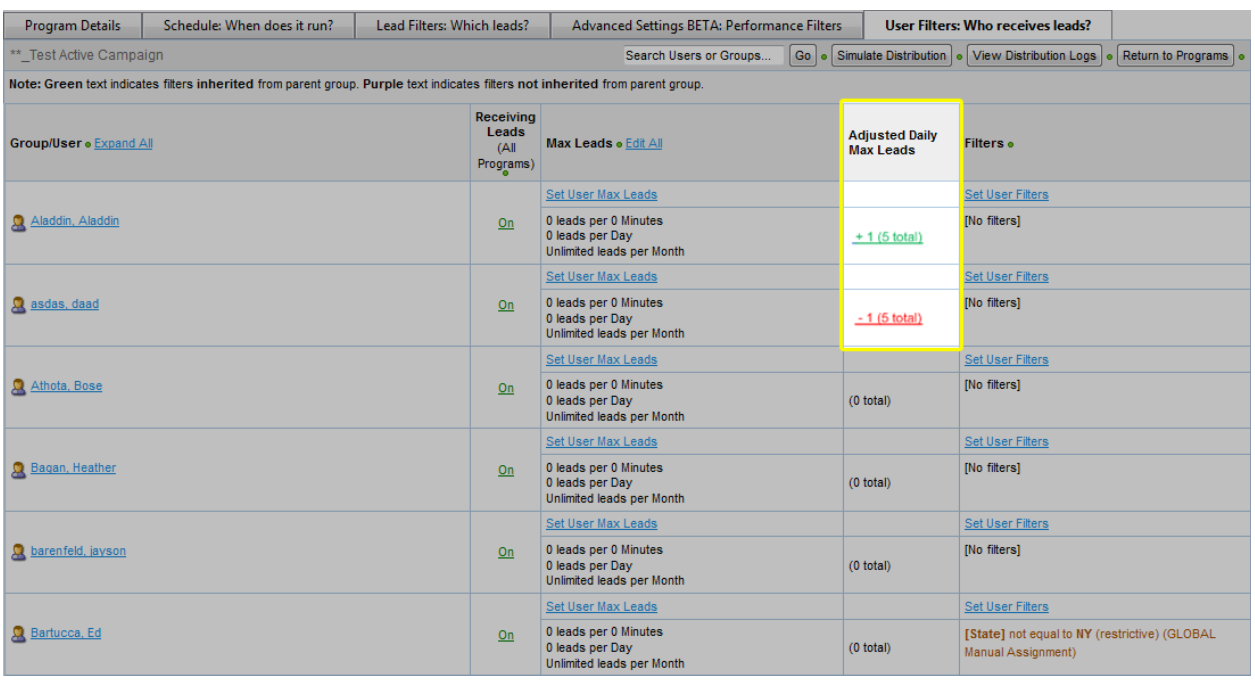
Setting a reward/penalty for a percentage based metric is done by putting a percentage in the first field, and putting a number of leads by which to increase or decrease the daily maximum. For example;

Reward: if {Conversion Rate} is GREATER THAN 15% then **INCREASE** Daily Lead Maximum by 2 leads.

After configuring the Performance Based Filters, Click the **Save** button.

User Filters: Who Receives Leads tab

It is possible to see the each user's adjusted lead flow on the **User Filters: Who receives leads?** tab



Group/User Expand All	Receiving Leads (All Programs)	Max Leads Edit All	Adjusted Daily Max Leads	Filters
Aladdin, Aladdin	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	+ 1 (5 total)	Set User Filters [No filters]
asdas, daad	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	- 1 (5 total)	Set User Filters [No filters]
Athota, Bose	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	(0 total)	Set User Filters [No filters]
Bagan, Heather	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	(0 total)	Set User Filters [No filters]
barenfeld, jayson	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	(0 total)	Set User Filters [No filters]
Bartucca, Ed	On	Set User Max Leads 0 leads per 0 Minutes 0 leads per Day Unlimited leads per Month	(0 total)	Set User Filters [State] not equal to NY (restrictive) (GLOBAL Manual Assignment)

There is a new **Adjusted Daily Max Leads** column on this tab.

1. **Adjusted Daily Max Leads Column** – This column is ONLY displayed to Enterprise customers and shows the adjusted Daily Max Leads number (+/-) based on currently enabled advanced distribution rules. A + or – number is shown indicating how many leads have been added or

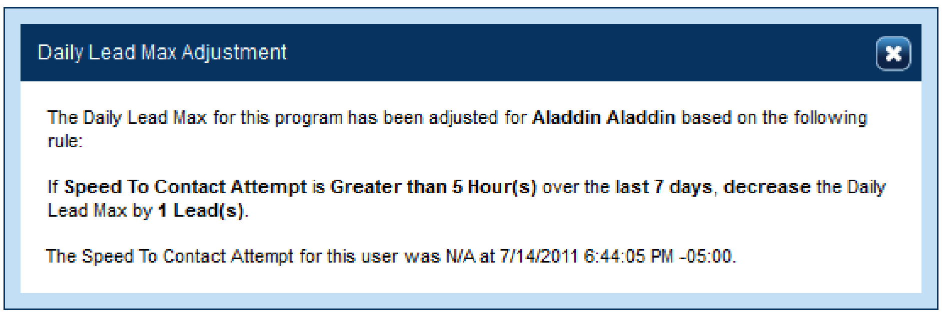
subtracted from the Daily Max Leads. In addition the total number of leads, including the adjustment is shown.

2. **Reward Note –** If the user has met the requirement for receiving additional leads, the note is displayed in green clickable text. When clicked, a popup, containing a description of the applicable rule, is displayed (see next section).
3. **Penalty Note -** If the user has met the requirement for receiving fewer leads, the note is displayed in red. When clicked, a popup, containing a description of the applicable rule, is displayed (see next section).

If no change has been applied to user's daily maximum, the **Adjusted Daily Max Leads** column will display the user's normal daily max.

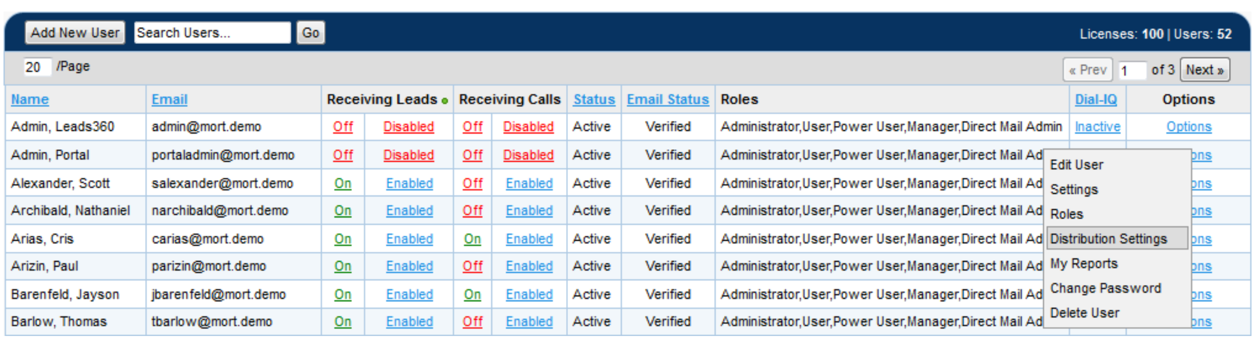
User Filters Page – Daily Lead Max Adjustment Popup

When an administrator clicks the text associated with the Reward or Penalty note, a popup is triggered. The popup contains a description of the relevant performance based filter.

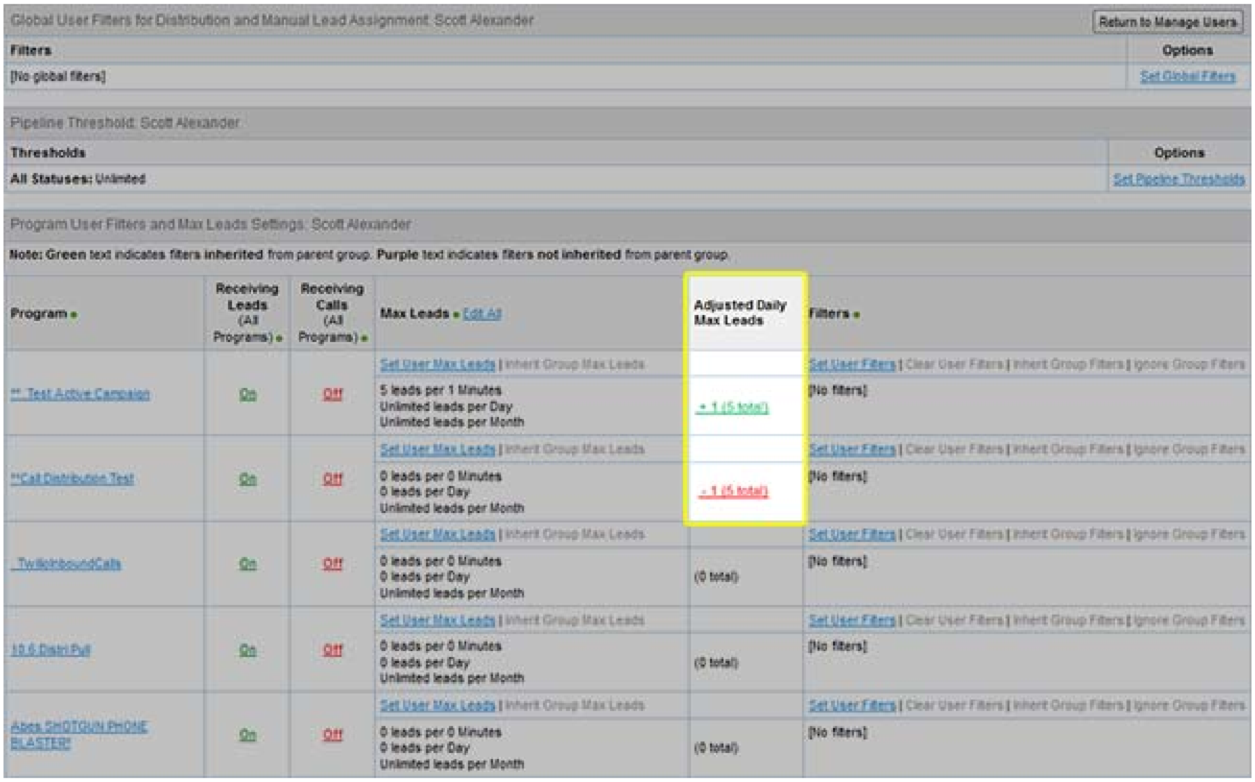


User Distribution Settings

On the Manage Users page, clicking the Distribution settings link on the Options column will display user distribution settings for the associated user.



The **Adjusted Daily Max Leads** column also appears on this page. Its functionality, including the Daily Lead Max Adjustment Popup is the same as where this column appears on the User Filters: Who Receives Leads tab on the Add/Edit Distribution page.

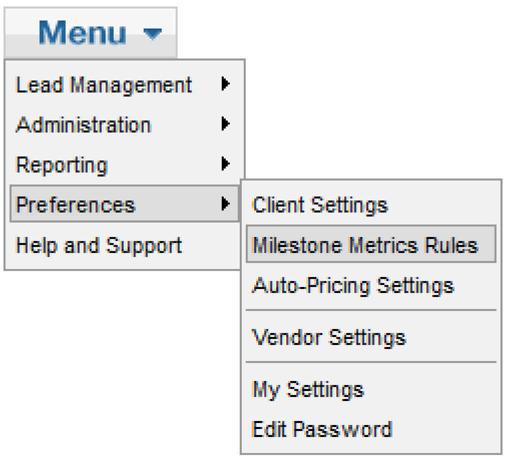


Configurable Milestone Metrics Rules

Overview

Prior to the 11.3 Release, **Milestone Metrics** calculations have been done including all leads in the system. This is being changed because certain leads can negatively and unduly impact the Metrics results (e.g. leads in the Bad Lead status). **Configurable Milestone Metrics Rules** give administrators control over which leads are included in their Milestone Metrics calculations.

To set the Milestone Metrics Rules, click **Milestone Metrics Rules** on the **Preferences** submenu



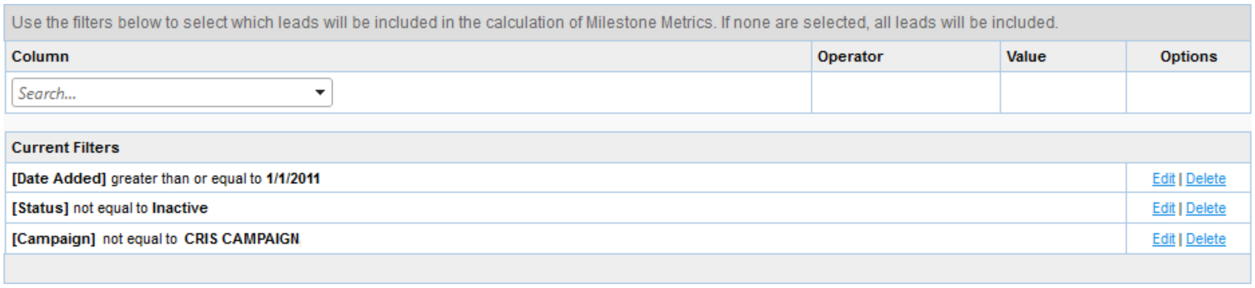
The **Milestone Metrics Rules** page is where an administrator can set filters that govern which leads will be part of **Milestone Metrics** calculations across the system. Whatever filters are applied here will affect how **Milestone Metrics** are calculated and displayed:

- In the **Milestone Metrics Report** that appears on the **Dashboard**
- In the **Milestone Metrics Report** that is found in the **Dashboard Reports** section of the **Reporting** menu
- In the **Performance Based Distribution** settings

Creating filters on this page is done as it elsewhere in Leads360. But in the case of **Milestone Metrics Rules**, only three fields are available to filter by:

- Status
- Campaign
- Date Added

To add a filter, select a **Column**, an **Operator,** and a **Value.** Then click the **Add Filter** button.



In the example above, the filters are:

- [Date Added] greater than or equal to 1/1/2011
- [Status] not equal to Inactive
- [Campaign] not equal to CRIS CAMPAIGN

With these filters applied, **Milestone Metrics** will be calculated by looking at leads that have been added to the system on or later than 1/1/2011, in a status other than Inactive, and in a campaign that does not contain "CRIS CAMPAIGN."

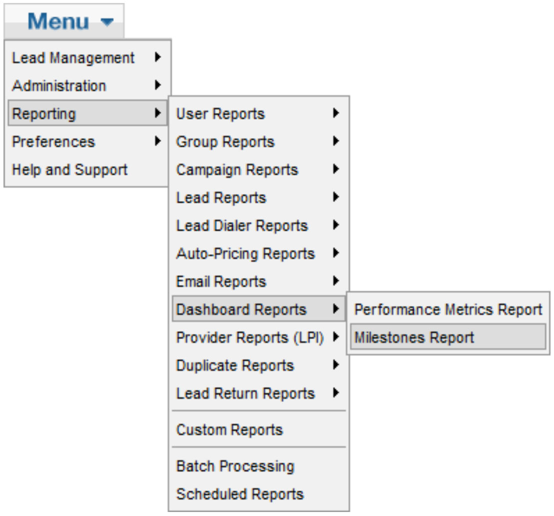
It is also possible to Edit or Delete these filters by clicking the **Edit** or **Delete** links in the **Options** column.

Milestone Metrics Dashboard and Report Consistency

Overview

There are two different reports that calculate **Milestone Metrics** in Leads360. Though they have similar names, prior to the 11.3 release, they calculated **Milestone Metrics** in different ways. The first is the **Milestones Report** that appears on the **Dashboard**.

The other report is found under **Dashboard Reports** on the **Reporting** menu.



By Campaigns | By Groups | By Users

-- All Campaigns -- From: 6/24/2011 To: 7/1/2011 Range: Today Go Export To Excel Email Report

Campaign	Speed To Contact Attempt	Speed To Contact	Contacts	%	Qualifications	%	Conversions	%
Lower My Bills	4h 20m	13h 47m	335	72%	272	58%	153	33%
Referral	53m	10h 28m	208	77%	168	62%	82	30%
Lending Tree	1h 50m	12h 57m	355	73%	285	59%	144	30%
Zillow	1h 43m	11h 56m	363	71%	286	56%	144	28%
Google	1h 49m	10h 39m	382	70%	294	54%	150	28%
Self Generated	1h 52m	8h 55m	185	73%	142	56%	69	27%

For the 11.3 release, the methods of calculating **Milestone Metrics** have been standardized so that the results in these reports mirror each other.

Calculation of Contact, Qualification and Conversion Rates

The logic as used on the Home Dashboard page has been applied to the Dashboard Milestones Report. The matrix below includes an explanation of the current methodology. The phrase “above leads” appears throughout the explanations of how Milestone Metrics are calculated. Here, “above leads” means the leads that are returned by the report tabs, applied filters, and date range.

	Client Level	User Level
Denominator	Count of all leads created in specified date range that are currently within specified campaign.	Count of all lead assignments (not unique leads) to specified user (or users currently in specified group) in specified date range that are currently within specified campaign, less the number of those unique leads that had reached the given milestone prior to the first assignment in the given date range.
Numerator	Count of above leads to have reached given milestone at any point in time.	Count of all unique leads from above to have reached given milestone while (a) if the filter is on a user (rather than group), the specified user owned the lead, if the filter is on the Group, the specified group that the user (owner) of the lead at the time of the Milestone being reached, is in.

Speed to Contact Attempt

Client Level - Of above leads to have reached Contact milestone, the average time between Date Added and First Contact Date (i.e., milestone date).

Group/User Level - Of above leads, the average time between the Last Assignment Date prior to hitting the milestone and the milestone date itself.

Speed to Contact

Client Level - Of above leads, the average time between Date Added and the date of the first action designated as a Contact Attempt or the start time of the first call using Dial-IQ, whichever came first.

Group/User Level - Of above leads in which no contact attempt was made prior to the respective assignment, the average time between the assignment and the first contact attempt date.

Dial-IQ Warm Transfer and Call Conferencing

Overview

Prior to the 11.3 Release, Leads360 has offered cold transfer, by which the transferring user is not able to speak to the receiving user before transferring the call. As part of the 11.3 release, Leads360 is offering **Warm Transfer**. This feature is available to all Dial-IQ clients.

For clients using **Click-to-Call**, **Warm Transfer** will not be available. There is an enhancement to the **Cold Transfer** functionality for **Click-to-Call** customers. See the next section; *Using Warm Transfer, Cold Transfer and Call Conferencing*

Leads360 is also releasing **Call Conferencing**. For the 11.3 release, 3-way **Call Conferencing** is available. Creating a call conference and Warm Transferring a call both are similar processes for the user, so they will both be covered in this section.

Client Settings

There are no additional Client Settings required to use Dial-IQ Warm Transfer or Call Conferencing.

Using Warm Transfer, Cold Transfer and Call Conferencing

To **Warm Transfer** a call or create a **Conference Call**, a user must have the lead on the phone and clicks the **Transfer** button on the **Dial-IQ Action Window**.

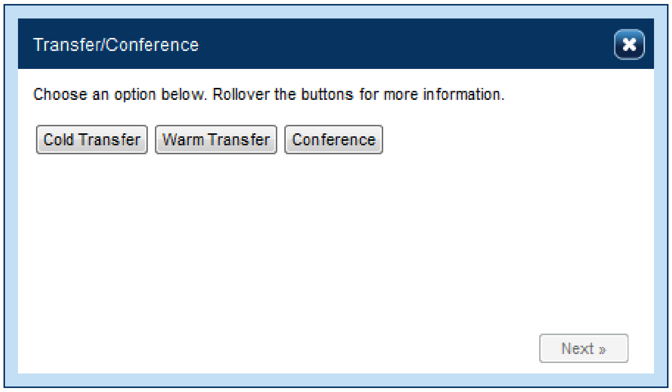
Clicking the **Transfer** button will open a modal window.

There are three stages that occur when a call is being **Warm Transferred** or a **Conference Call** is being created.

1. Select Wizard Type – Here a user chooses **Cold Transfer**, **Warm Transfer**, or **Conference Call**
2. Select Number Type – Here a user chooses the user to whom the lead will be transferred
3. Dashboard – Here a user makes the connection between the other two numbers

Call Transfer/Conference Select Wizard Type

When a user clicks the **Transfer** button on the **Dial-IQ Action Window** the modal window loads with three buttons; **Cold Transfer**, **Warm Transfer**, or **Conference**.

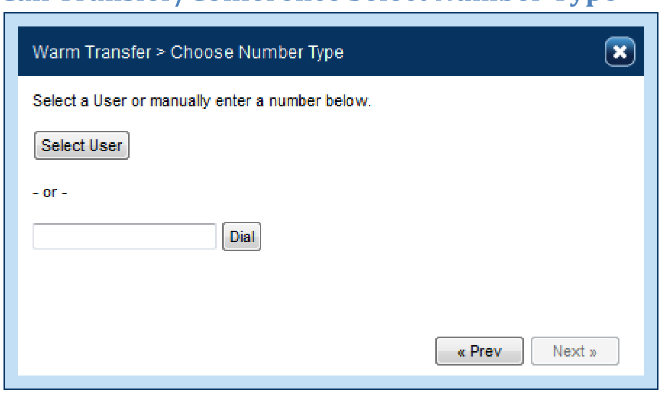


From this modal window, users click the button to choose **Cold Transfer**, **Warm Transfer**, or **Conference**. The user is still connected to the lead.

Click-to-Call customers will only have the **Cold Transfer** button.

Regardless of which wizard is selected, the next step will be the same.

Call Transfer/Conference Select Number Type

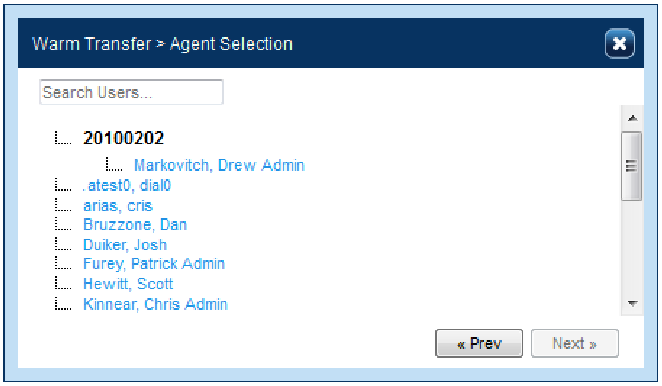


The next step is to choose the person you want to transfer the call to, or conference with. This is done in one of two ways:

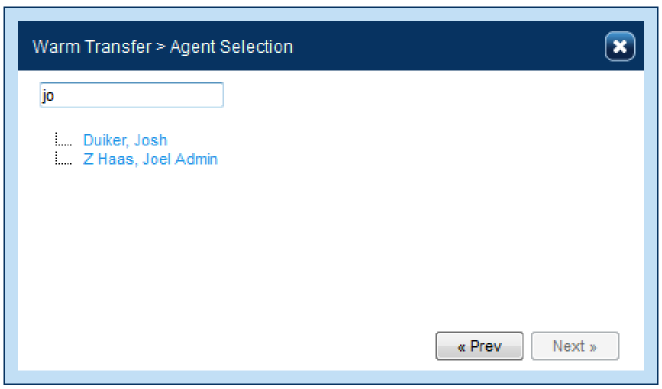
1. By clicking the **Select User** button
2. By entering a phone number in the field and clicking the **Dial External** button.

Select Number Type: Select User button

Clicking the **Select User** button will load a list of eligible users in the modal window. Eligibility in this case defined as: a Dial-IQ user whose **Receive Calls** button is **On** and who is not currently on a Dial-IQ call.



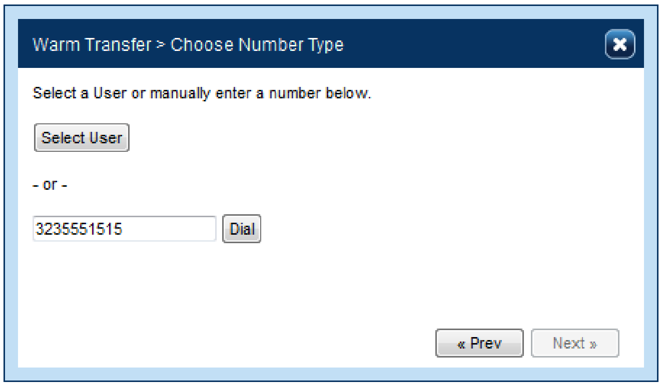
It is possible to scroll down and click a users name to select them as the user to receive the call. Users can also be found by typing a user name, or portion of the users name into the **Select Agent** search box. Search results are returned dynamically.



Clicking the name places a call to the User and places the lead on hold.

Select Number Type: Dial Button

When selecting **Number Type**, the second option is to key in a number and click the **Dial** button. To transfer a call this way, key the number into the field and click the **Dial External** button. When you enter the number and click the **Dial** button the receiving user will be called and the lead will be placed on hold.



Once the receiving user is chosen and the number is selected, a call is placed to that user.

If **Cold Transfer** was the **Wizard Type** that was selected, then once the user is selected, the call is transferred and the transferring user is disconnected. If the receiving user is a Dial-IQ user, the lead is assigned to the receiving user.

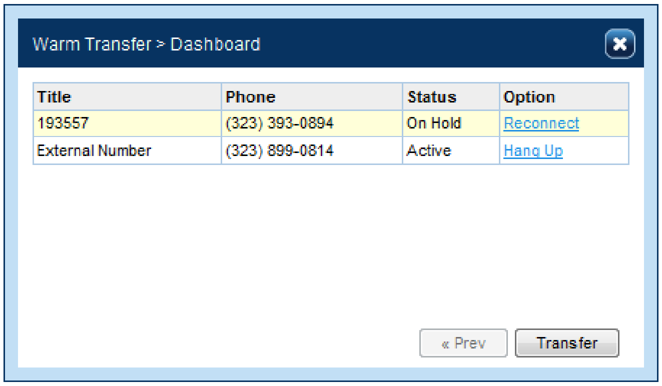
The user receiving the **Cold Transfer** will get a pop up alert notifying them that they are receiving a **Cold Transfer**.

Clicking the **View Call Details** button will expand the **Dial-IQ Action Window**.

Call Transfer/Conference Dashboard

If **Warm Transfer** or **Call Conference** was the selected **Wizard Type**, then the modal window will load a **Dashboard** that displays information about the numbers the transferring user is connected to. This includes the call status, e.g., On Hold, Active; and an **Option** column that gives the transferring user the option to take the holding call off of hold and hang up on the receiving user.

Dashboard – Warm Transfer



If the selected **Wizard Type** was **Warm Transfer**, clicking the **Transfer** button will transfer the call, and assign the lead to the receiving user.

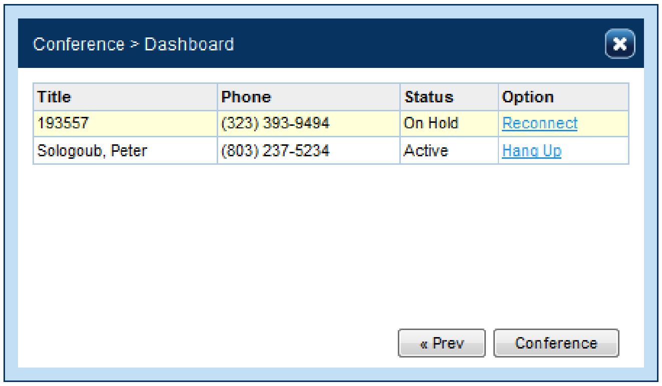
The transferring user will remain connected to the call and must click the **Hang Up** button on the **Dial-IQ Action Window** to disconnect from the call. When the transferring user hangs up, the receiving user and the lead will remain connected.

The user receiving the **Warm Transfer** will get a pop up alert notifying them that they are receiving a **Warm Transfer**

Clicking the **View Call Details** button will expand the **Dial-IQ Action Window**.

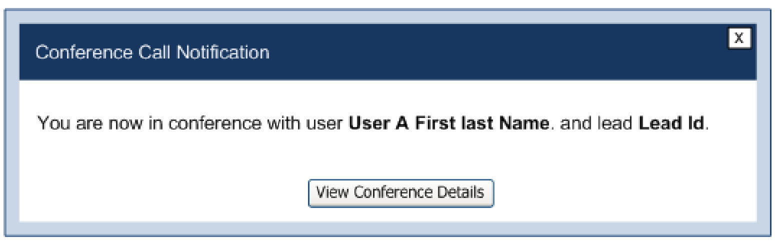
Dashboard – Conference Call

If the selected **Wizard Type** was **Call Conference**, clicking the **Conference** button will create the conference call by connecting all three users; making their Status Active.



When the user creates the **Conference**, the lead will remained assigned to him and he will retain control of the conference. If the initial user ends the call, the two other calls will be terminated.

The user receiving the **Conference Call** will get a pop up alert notifying them that they are receiving a **Conference Call**.



Clicking the **View Call Details** button will expand the **Dial-IQ Action Window**.

Dial-IQ Call Logging

Overview

Some Dial-IQ features make multiple call 'legs' as part of one interaction with the lead; for instance Call Transfer. In the example of call transfer, there is a call between one user and a lead, and then another user is called; so the lead is connected to two different users. This call consists of three legs.

The Dial-IQ call logging has been expanded to give a fuller picture of all call legs made by Dial-IQ.

Dial-IQ Calls appear in the action logs as they always have. But each entry is a clickable link. Click the link to expand the Dial-IQ Logs. The Dial-IQ Logs will display all call legs that were a part of the clicked Dial-IQ call.

Actions Only   Logs Only   Actions & Logs   Calendar Events   Duplicate Leads

Entry	Comment	User	Date
Dialer Call	Connected [424-235-1751], Duration: [00:07:50]	[Peter2 Test]	Fri 7/8/2011 11:58 AM
Dialer Call	Connected [424-235-1751], Duration: [00:00:45]	[Peter2 Test]	Fri 7/8/2011 11:42 AM
Dialer Call	Connected [424-235-1751], Duration: [00:01:01]	[Peter Admin Sologoub]	Fri 7/8/2011 11:17 AM
Dialer Call	Disconnected [424-235-1751]	[Peter2 Test]	Fri 7/8/2011 10:45 AM

Dialer Logs

Type	Status	Duration	Leg User	Date
Manual	Connected [3107657515]	--	Peter Admin Sologoub	Fri 7/8/2011 2:00 AM
LeadLeg	Connected [4242351751]	00:01:03	Peter Admin Sologoub	Fri 7/8/2011 2:00 AM