

Little Giant Sales Stages Overview

- 1. New Lead**
 - a. This will be your default stage when new leads are delivered into Infusionsoft.
 - b. Only real-time purchased leads will be sent an email intro, SMS, and phone call.
 - i. Business Hours: Email, SMS and phone call are immediately
 - ii. If outside Business Hours: SMS is sent immediately notifying the consumer that the office is closed.
 1. Phone call will be made once business hours are open
- 2. Pending Contact – *Starting next business day***
 - a. This stage is used for when you do NOT have enough information to quote and you need to have a conversation with them.
 - b. 5 emails will be sent over 20 days. If no response, consumer will automatically move to X-dated.
 - c. 4 text messages will be sent over 20 – 30 days. If no response, consumer will automatically move to X-dated.
- 3. Quoted –Start Immediately**
 - a. If you are able to provide a quote to consumers, this is your most productive automation campaign.
 - b. 5 emails will be sent over 20 – 30 days with your “Quote Details” populated in emails. If no response, consumer will automatically move to X-dated.
 - c. 4 text messages will be sent over 20 – 30 days with your “Quote Details” populated in the texts. If no response, consumer will automatically move to X-dated.
- 4. Quoted – Start tomorrow**
 - a. If you are able to provide a quote to consumers, this is your most productive automation campaign.
 - b. 5 emails will be sent over 20 – 30 days with your “Quote Details” populated in emails. If no response, consumer will automatically move to X-dated.
 - c. 4 text messages will be sent over 20 – 30 days with your “Quote Details” populated in the texts. If no response, consumer will automatically move to X-dated.
- 5. In Negotiation**
 - a. This is our “SAFETTY” stage. NO automation happens and is completely dependent on your follow-up and moving them out of this stage.
 - b. Commonly used if the consumer told you to follow-up a specific time or you are getting back to them with requested information.
 - c. If your contact is in this stage for 10 days, the owner will receive a task notification to make sure the contact should be moved to another stage or stay.
- 6. X-dated**
 - a. When a consumer isn’t a fit, moving them to X-dated will put them in a future follow-up campaign
 - i. If auto/home expiration date is present, email and SMS follow-up will start 31 days before.
 - ii. You will also receive an email notification once this process starts (this notification can be turned off if preferred).
- 7. Policy Sold**
- 8. Bad Lead /DNC**
 - a. This is a lead that should be returned for credit to the lead provider

Visual work flow print out on next page

Sales Stage Automation

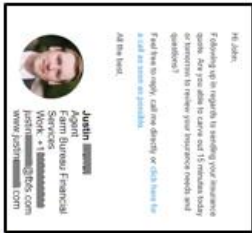


Pending Contact

Email

Day 2

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Day 4 – Email/SMS

Day 7 – Email/SMS

Day 11 – Email/SMS

Day 16 – Email

Day 20 – Email

X-dated

Quoted

Email

Day 2

Infusionsoft Certified Partner



Day 4 – Email/SMS

Day 7 – Email/SMS

Day 11 – Email/SMS

Day 16 – Email

Day 20 – Email

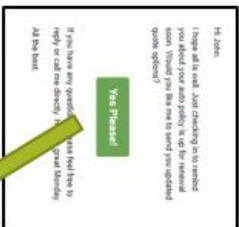
X-dated

X-dated

Campaign Field Timer



Email 1



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Click Notifications

Username	Assigned Date	Status	Details
3723/2008	[Not Assigned]	[Not Assigned]	John Adams Moved into Quoted [Not Started]
3726/2008	[Not Assigned]	[Not Assigned]	Clicked "Yes" in auto policy renewal for updated... [Not Started]
3730/2008	[Not Assigned]	[Not Assigned]	90 Day Business Campaign Status is 180 Day [Not Started]