

LITTLE GIANT MARKETING

OPPORTUNITY STAGES OVERVIEW

1 NEW LEAD

DESCRIPTION: THIS WILL BE YOUR DEFAULT STAGE WHEN A NEW LEAD IS ASSIGNED TO YOU IN LITTLE GIANT.

WORKFLOW: LEADS ARE SENT A TEXT MESSAGE AND EMAIL INTRODUCTION.

2 PENDING CONTACT

STARTING 4 HOURS FROM BEING MOVED INTO THIS STAGE (BETWEEN 9AM – 5PM)

DESCRIPTION: THIS STAGE IS USED FOR WHEN YOU DO NOT HAVE ENOUGH INFORMATION TO QUOTE AND YOU NEED TO HAVE A CONVERSATION WITH THEM.

WORKFLOW: 5 EMAILS AND 5 TEXT MESSAGES WILL BE SENT OVER 20 – 30 DAYS. IF NO RESPONSE, CONSUMER WILL AUTOMATICALLY MOVE TO X-DATED.

3 QUOTED STAGES

DESCRIPTION: IF YOU ARE ABLE TO PROVIDE A QUOTE TO CONSUMERS, THIS IS YOUR MOST PRODUCTIVE AUTOMATION CAMPAIGN.

WORKFLOW: 5 EMAILS AND 5 TEXT MESSAGES WILL BE SENT OVER 20 – 30 DAYS WITH YOUR “QUOTE DETAILS” POPULATED IN EMAILS. IF NO RESPONSE, CONSUMER WILL AUTOMATICALLY MOVE TO X-DATED.

PROCESS: YOU HAVE 2 OPTIONS WHEN SUBMITTING A QUOTE TO A LEAD. EITHER YOU WANT TO SEND THE QUOTE DETAILS IMMEDIATELY, OR WAIT 1 DAY BEFORE SENDING IT (TOMORROW).

Quote Follow-up

Start quote details workflow immediately

Start quote details workflow tomorrow

Quote Details

Homeowners: Total for the year is \$1,313 or \$119/month.

4 IN NEGOTIATION/ SCHEDULED CALL

DESCRIPTION: THIS IS OUR “SAFETY” STAGE. NO AUTOMATION HAPPENS AND IS COMPLETELY DEPENDENT ON YOUR FOLLOW-UP AND MOVING THEM OUT OF THIS STAGE.

COMMONLY USED IF THE CONSUMER TOLD YOU TO FOLLOW-UP A SPECIFIC TIME OR YOU ARE GETTING BACK TO THEM WITH REQUESTED INFORMATION.

WORKFLOW: 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.

5 MISSED APPOINTMENT

DESCRIPTION: YOU CAN USE THIS STAGE TO TRIGGER AN EMAIL AND TEXT MESSAGE TO A CONTACT WHO DIDN'T SHOW UP TO AN APPOINTMENT.

PROCESS: YOU'LL STILL NEED TO MAKE YOUR CALL FOLLOW-UPS. YOU CAN THEN MOVE THE LEAD TO A NEW STAGE THE NEXT DAY.

6 X-DATED

DESCRIPTION: WHEN A CONSUMER ISN'T A FIT, MOVING THEM TO X-DATED WILL PUT THEM IN A FUTURE FOLLOW-UP CAMPAIGN.

WORKFLOW: IF AUTO/HOME EXPIRATION DATE IS PRESENT, EMAIL AND TEXT MESSAGE FOLLOW-UP WILL START 31 DAYS BEFORE THAT SPECIFIC DATE.

YOU WILL ALSO RECEIVE AN EMAIL NOTIFICATION ONCE THIS PROCESS STARTS (THIS NOTIFICATION CAN BE TURNED OFF IF PREFERRED).

PROCESS: WHEN YOU X-DATED A LEAD, YOU'LL NEED TO UPDATE THE X-DATED REASON FIELD AS WELL. THIS HELPS WITH REPORTING AND CLOSING DEALS LATER ON.

7 POLICY SOLD

PROCESS: WHEN YOU MOVE A LEAD TO POLICY SOLD, YOU'LL NEED TO UPDATE THE OPPORTUNITY VALUE FIELD AND ALL OTHER CUSTOMER RELATED FIELDS.

8 BAD LEAD /DNC

DESCRIPTION: THIS IS A LEAD THAT SHOULD BE RETURNED FOR CREDIT TO THE LEAD PROVIDER

PROCESS: WHEN YOU MOVE A LEAD TO BAD LEAD, YOU'LL NEED TO UPDATE THE BAD LEAD REASON FIELD AS WELL. THIS HELPS WITH REPORTING AND MAKING LEADS BETTER.