

## Sales Stages Overview

### 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.

### PENDING CONTACT



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

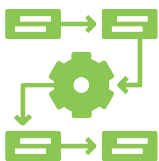
#### DESCRIPTION

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.

### 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

Your quote comes up to 104/monthly

## 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.



## MISSING DETAILS

### DESCRIPTION

THIS STAGE IS USED WHEN REQUIRED FIELDS WERE NOT COMPLETED IN THE QUOTED, X-DATED, BAD LEAD, OR POLICY SOLD STAGES. IT ACTS AS A SYSTEM-GENERATED "HOLDING ZONE" UNTIL YOU COMPLETE THE MISSING INFO.

### TRIGGER

IF A REQUIRED FIELD IS LEFT BLANK, THE SYSTEM WILL AUTOMATICALLY MOVE THE OPPORTUNITY BACK HERE AND NOTIFY THE OWNER TO UPDATE IT

### PROCESS

ONCE THE MISSING FIELD IS COMPLETED (EXAMPLE: QUOTE SUMMARY, FOLLOW-UP TIMING, X-DATED REASON, ETC.), YOU'LL NEED TO MANUALLY MOVE THE OPPORTUNITY BACK INTO THE CORRECT STAGE.

### PRO TIP

THINK OF THIS AS YOUR REMINDER BOARD - CLEAN IT OUT DAILY TO KEEP YOUR PIPELINE FLOWING!

### REQUIRED FIELDS BY STAGE

#### •QUOTED STAGE

- FOLLOW-UP TIMING (IMMEDIATE OR TOMORROW)
- QUOTE SUMMARY (IN QUOTE DETAILS FIELD)

#### •X-DATED STAGE

- X-DATED REASON

#### •BAD LEAD STAGE

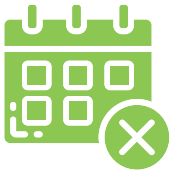
- BAD LEAD REASON

#### •POLICY SOLD STAGE

- OPPORTUNITY VALUE (POLICY PREMIUM)



## MISSED APPOINTMENT



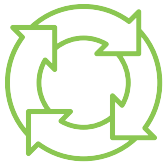
### DESCRIPTION

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

### WORKFLOW

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

## 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.

## POLICY SOLD



UPDATE THE OPPORTUNITY VALUE FIELD AND ALL OTHER CUSTOMER RELATED FIELDS.

### PROCESS

WHEN YOU MOVE A LEAD TO POLICY SOLD, YOU'LL NEED TO REMEMBER TO INSTALL OUR CONFETTI CHROME EXTENSION TO LET EVERYONE KNOW YOU MADE A SALE! IN YOUR LGM MENU, GO TO "CONFETTI EXTENSION".

## 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.