

# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (1/3)



| Name            | Lead Status | Location (County, State) | Lead Owner   | Lead Type                  | Received Date |
|-----------------|-------------|--------------------------|--------------|----------------------------|---------------|
| Martha Gongloff | New         | Centre, PA               | TESTER AGENT | Aged Final Expense Mailers | 6/25/2023     |
| Laura Cori      | New         | Centre, PA               | TESTER AGENT | Aged Final Expense Mailers | 6/25/2023     |
| Wayne Heverly   | New         | Centre, PA               | TESTER AGENT | Aged Final Expense Mailers | 6/25/2023     |
| Dorothy Foster  | New         | Centre, PA               | TESTER AGENT | Aged Final Expense Mailers | 6/25/2023     |
| Kermit Spotts   | New         | Centre, PA               | TESTER AGENT | Aged Final Expense Mailers | 6/25/2023     |

**Step 1: On the left side, click "Manage Leads". All purchased leads will appear.**

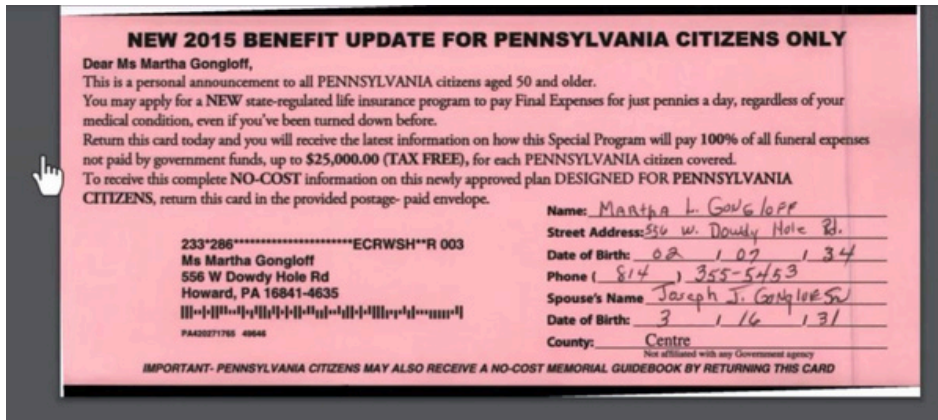
Step 2: There are different filters you can select to view your leads.

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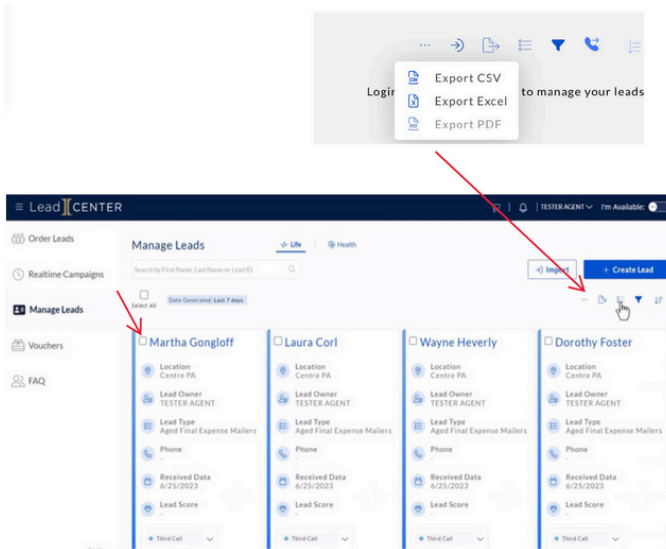
Step 3: To view a lead, click "Template".

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# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (2/3)

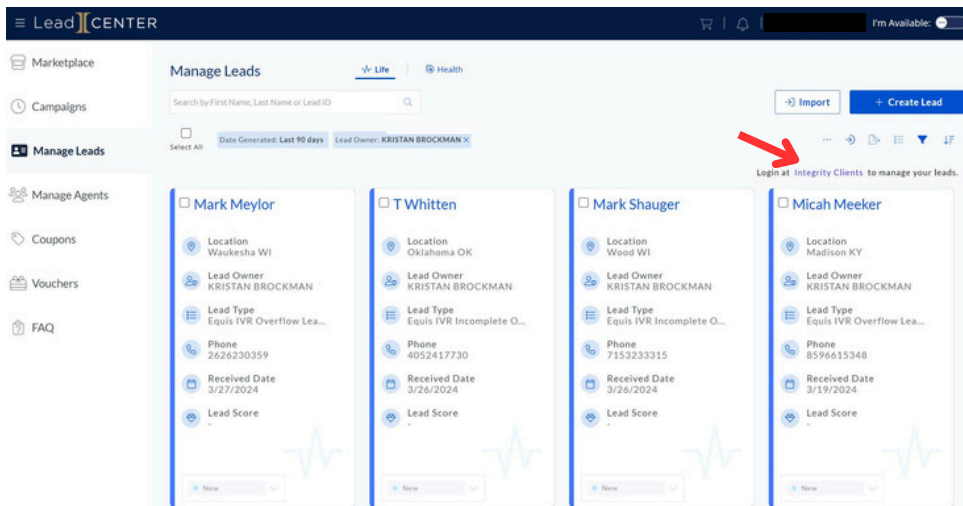


**Step 4: You are able to view or print the lead.**



**Step 5: Check box next to name of leads you wish to export and/or print. Click the export icon to export selected leads into the format of your choice.**

**Formats include csv, excel or PDF .**



**Step 6: To complete dispositions and/or use the features in Integrity Clients, click "Integrity Clients".**

# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (3/3)



Good Afternoon,

Client Snapshot

- New: 8
- Contacted: 0
- Engaged: 0
- Client: 4
- Retained: 0
- Loyal: 0
- Lost: 0

Policy Snapshot

Declined: 0 Applied: 0 Issued: 0 Unlinked: 0

Task List

Plan/Enroll Leads: 1 Reminders: 0 Unlinked Calls: 2

Skylar Brockman  
kabrockman34@gmail.com  
Date Requested: 04/19/2024 at 11:04 am  
Stage: New  
View Contact

Step 7: Click "Contacts".

Contacts

Back Import Add New

| Name             | Stage  | Tags | Life | Health |
|------------------|--------|------|------|--------|
| Clerk Hess       | Client | ...  | ...  | ...    |
| Randy Reiders    | Client | ...  | ...  | ...    |
| Kristan Brockman | New    | ...  | ...  | ...    |
| Abina Forslund   | New    | ...  | ...  | ...    |
| Daniel Kauf      | New    | ...  | ...  | ...    |
| Miaah Meeker     | New    | ...  | ...  | ...    |
| Bill Martin      | Client | ...  | ...  | ...    |

Getting Started Guide  
Dashboard

The Dashboard screen in Integrity is designed to give agents an up-to-date overview of their book of business. It includes the Client Snapshot, Policy Snapshot, Task List, and Activity Stream.

**Client Snapshot**

Each Contact record in Integrity has a value assigned in the Stage dropdown. The Stage value is updated either automatically by Integrity or manually by the agent, to help the agent track the Contact's progress through the sales cycle. On the left side of the Dashboard screen, the Client Snapshot quickly takes agents to a filtered list of all Contacts in a certain stage - like New or Contacted - so it's easier for the agent to find and follow up with their Contacts.

**New:** Default value for new Contacts added to Integrity. Usually used for new leads.

**Contacted:** Contacts the agent has reached out to are automatically updated to this stage if:

- There are one or more call recordings linked to the Contact record (either incoming or outgoing)
- And / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).

Agents can set update Contacts to this Stage manually if it's not done automatically.

**Engaged:** A Contact with one of the following actions completed:

- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

**Client:** The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.

**Retained:**

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy (based on effective dates)

Step 8: Use the client snapshot to track client activity and complete dispositions.