

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.

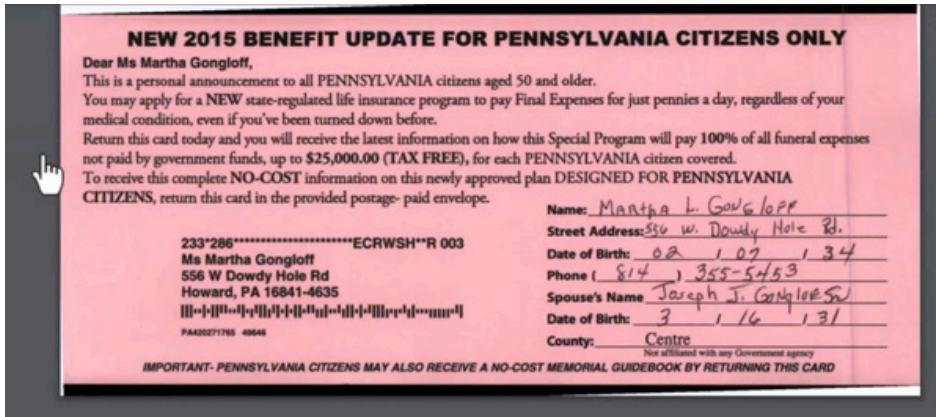
Step 2: There are different filters you can select to view your leads.

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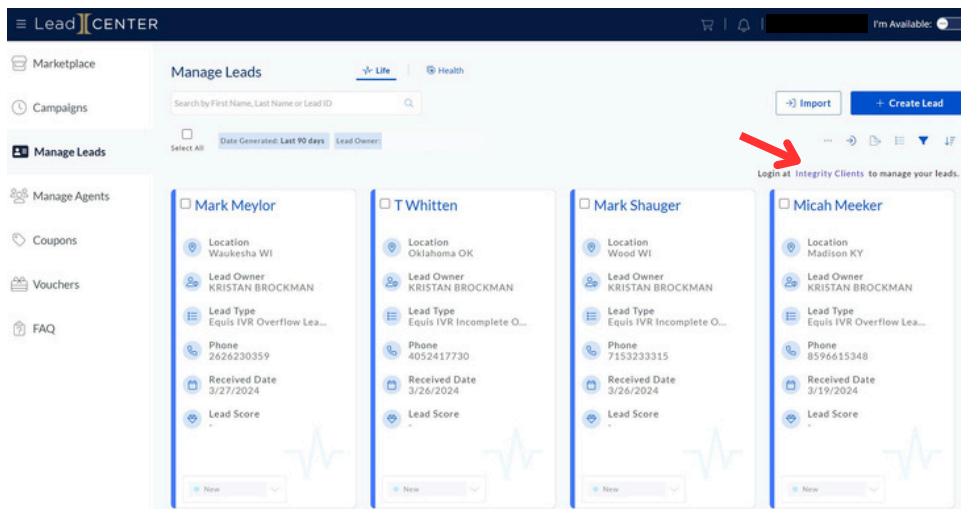
Step 3: To view a lead, click "Template".

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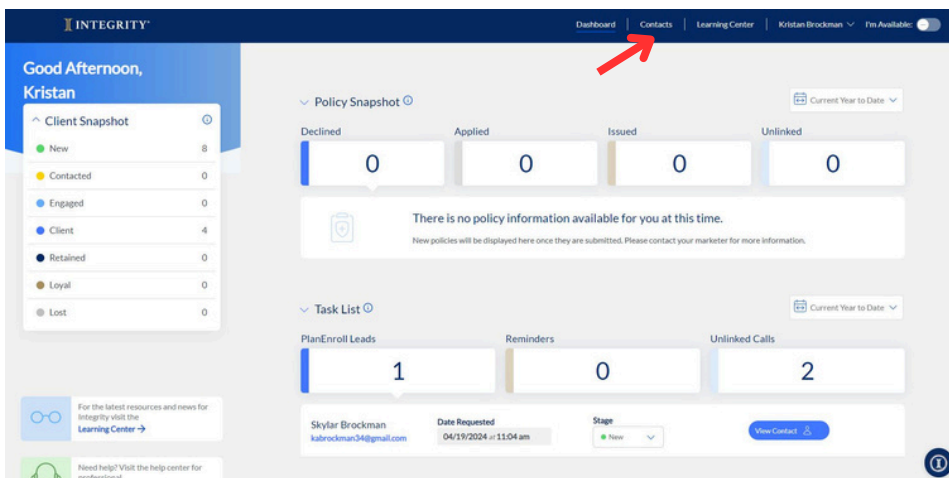
MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (2/3)



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



Step 5: To complete dispositions and/or use the features in Integrity Clients, click "Integrity Clients".



Step 6: Click "Contacts".

MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (3/3)



INTEGRITY | Dashboard | Contacts | Learning Center | Kristian Brockman | I'm Available

Back | Contacts | Import | Add New

Search

Name	Stage	Tags	Life	Health
Clint Hess	Client	Life	Health	...
Randy Robinson	Client		Health	...
Kristian Brockman	New		Health	...
Alana Forslund	New		Health	...
Daniel Kaul	New		Health	...
Michal Meeker	New		Health	...
Bill Martin	Client		Health	...

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)

Good Morning, Rachel!

Client Snapshot

New	3
Contacted	3
Engaged	13
Client	15
Retained	11
Lost	35

Policy Snapshot

Declined	3	Applied	8
Issued	34	Unfilled	7

Step 7: Use the client snapshot to track client activity and complete dispositions.