

FUNDED LEADS

Going forward, any funded leads that do not convert to a client within 30 days of creation will be reassigned to the local sales teams for follow-up. As of this afternoon (August 20), nearly 2,000 leads have been sent back to the markets (*note: this will exclude any leads already tagged as invalid / unqualified*).

Leads have been put in the Market’s Queue; Sales leaders are responsible for checking the lead queue to redistribute these funded leads to thier reps for follow-up.

LEAD SOURCES

These funded leads came in via Valpak or Clipper-funded lead channels which include the following:

- SEM Campaigns
- Lead generation inserts (inside the Blue Envelope)
- Call tracking tagline on the Blue Envelope
- Organic website leads

If the Franchise Name says, “Clipper of ____”, the lead initially requested info on Clipper products. If it says, “Valpak of _____”, the lead requested Valpak product info.

STEPS FOR MANAGERS TO ACCESS THE MARKET QUEUES

1. Click on the Leads Tab
2. In the lead list dropdown, search for All Unassigned Leads in the Queue (or bookmark this link: https://valpak.lightning.force.com/lightning/o/Lead/list?filterName=All_Open_Leads_in_Queue)
3. Note: You will see all owned markets in this lead; to reduce the list to your area, do one of the following to filter:
 - a. Click on the column header “Franchise” to sort ascending/descending

<input type="checkbox"/>	Created Date	Franchise	Lead Sta...	Lead Source ↓	B...
1	<input type="checkbox"/> 8/16/2024 10:36 A...	Valpak of Cleveland	Qualified	SEM - Bing	100
2	<input type="checkbox"/> 8/9/2023 11:46 PM	Valpak of Austin	Parking L...	SEM - AdWor...	48
3	<input type="checkbox"/> 5/2/2024 3:08 PM	Valpak of Chicagoland	Qualified	SEM - AdWor...	100
4	<input type="checkbox"/> 6/29/2024 1:38 AM	Valpak of Greater Houston	Parking L...	SEM - AdWor...	93

Leads
All Unassigned Leads in Queue

50+ items • Sorted by Created Date • Filtered by All leads - 6 more filters

	Created Date	Franchise	Zip/...	Category	Sub-Category	Owner Full N
1	8/20/2024 1:25 ...	Valpak of Greater Sacrame	957...			Sales
2	8/20/2024 1:04 ...	Valpak of Bay Area	950...			Sales
3	8/20/2024 11:10...	Valpak of Idaho	836...	Dining / Food / ...	Pizza Restauran...	Idaho
4	8/20/2024 10:07...	Valpak of Upstate South	296...	General Services...	Other General S...	3525-Upstate
5	8/20/2024 9:59 ...	Valpak of Southern Utah	847...	Medical [7]	Dentists [36]	3329-Souther

STEPS FOR MANAGERS TO REASSIGN:

1. Open the lead by clicking on the Company Name or Name
2. Click on the person to the right of the Lead Owner field

Lead
LLC

Name: Timur Saitov | Phone (2): (949) 315-0529 | Email: ststimur@gmail.com | Lead Source: Lead Gen Insert

Launch Campaigns (0) | Campaign History (4) | Lead History (10+) | Lead Owner S

Attempt 1 | Attempt 2 | Attempt 3 | Attempt 4

Feed | **Details**

Lead Owner: 3920-Home Office

Name: Timur Saitov

3. Search for the rep you want to reassign to
4. Check the box to “Send Notificaiton Email” to the new user
5. Click Change Owner

Change Lead Owner

Search Users...

Send notification email

The new owner will also become the owner of these records related to **Timur Saitov** that are owned by **3920-Home Office**.

- Notes and attachments
- Open activities

Cancel | Change Owner