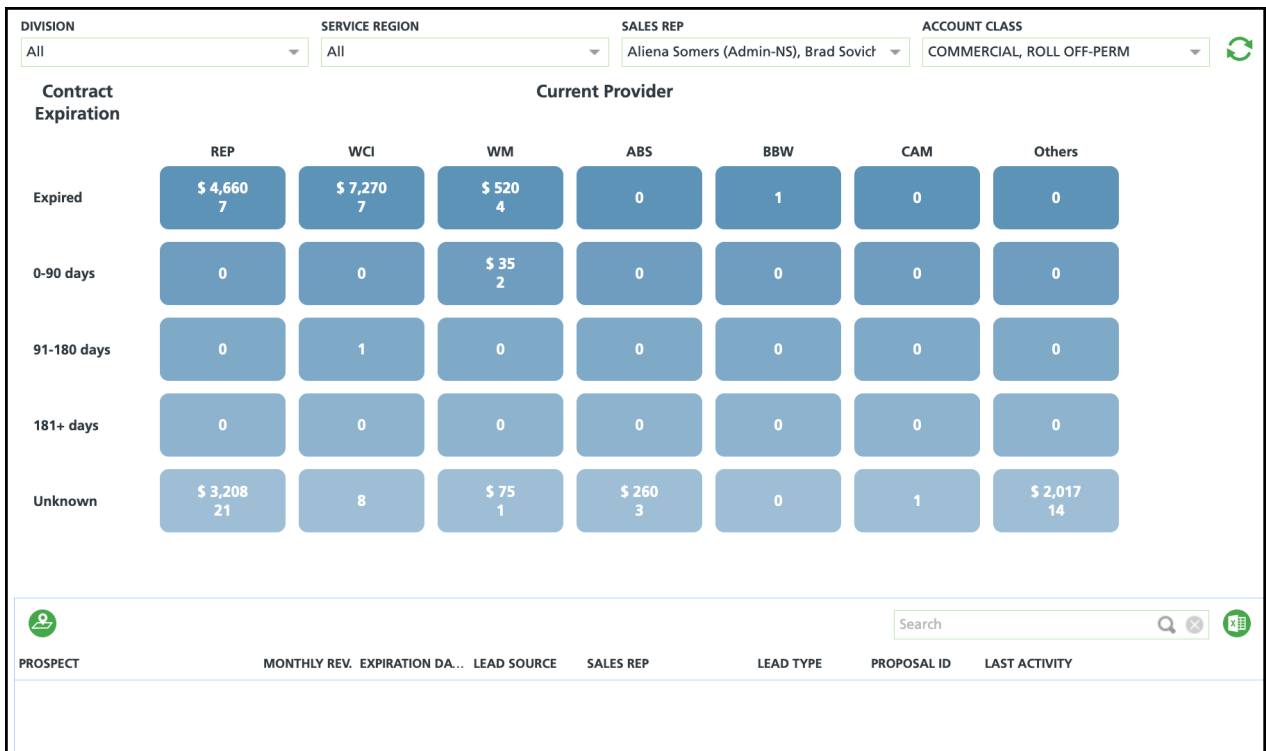


Pipeline Leads

Last Modified on 03/19/2024 4:19 pm EDT

Pathway: Sales > Pipeline > Leads

The Pipeline Leads tool provides sales representatives with the information they need to identify and target new customers based on previously collected prospect information. This tool only includes leads who's information has been collected but have not received a proposal, quote or contract.



Permissions

The following permissions are required to view and use the Leads Pipeline screen:

Permission ID	Permission Name
65	User Activities, Leads, and Opportunities

Filter Options

Filtering options are available and narrow down what displays on the screen. Filter options include: Division, Service Region, Sales Rep, and Account Class.

Filter Type	Description
Division	The division assigned to the prospect account.
Service Region	Indicates the region where the prospect accounts are located.

Filter Type	Description
Sales Rep	Filters by the Sales Representative who created the lead.
Account Class	Filters by the account class the prospect account was assigned - Government, Residential, Commercial, Broker, and etc.

Understanding the Pipeline Leads Grid

The Pipeline Leads grid breaks down prospect leads by competitor and contract expiration and includes the monthly revenue amount the prospect is paying to their current provider. Select a cell within the grid to view details for each of the leads it includes.

DIVISION
All

SERVICE REGION
All

SALES REP
Aliena Somers (Admin-NS), Brad Sovict

ACCOUNT CLASS
COMMERCIAL, ROLL OFF-PERM

Current Provider

Contract Expiration	REP	WCI	WM	ABS	BBW	CAM	Others
Expired	\$ 4,660 7	\$ 7,270 7	\$ 520 4	0	1	0	0
0-90 days	0	0	\$ 35 2	0	0	0	0
91-180 days	0	1	0	0	0	0	0
181+ days	0	0	0	0	0	0	0
Unknown	\$ 3,208 21	8	\$ 75 1	\$ 260 3	0	1	\$ 2,017 14

Search

PROSPECT	MONTHLY REV.	EXPIRATION DA...	LEAD SOURCE	SALES REP	LEAD TYPE	PROPOSAL ID	LAST ACTIVITY
Example Prospect 1	\$ 1,650.00	988 days ago	Employee	Rob Jones			Site Viewed (67 days ago)
Example Prospect 2	\$ 100.00	930 days ago	Employee	Rob Jones			Site Viewed (271 days ago)
Example Prospect 3	\$ 130.00	976 days ago	Employee	Rob Jones	Cold Call		Site Viewed (511 days ago)
Example Prospect 4	\$ 50.00	624 days ago	Employee	Matt lori gmail Eckstr...			Site Viewed (487 days ago)
Example Prospect 5	\$ 200.00	349 days ago	Employee	Rob Jones			Site Viewed (487 days ago)
Example Prospect 6	\$ 130.00	798 days ago	Employee	Rob Jones			Site Viewed (273 days ago)
Example Prospect 7	\$ 2,400.00	597 days ago	Employee	Stevan Smith			Site Viewed (486 days ago)

Field Descriptions

The following fields display when a cell is selected from the upper grid.

Field Descriptions	Descriptions
Prospect	The name of the prospect (lead) account. Click on the name of the prospect to be taken to the account.
Monthly Revenue	The monthly amount paid by the lead to their current provider.

Field Descriptions	Descriptions
Expiration Date	The expected date the prospect leads contract with the current provider will expire.
Lead Source	How the lead originated. This is identified when the lead is created in the system.
Sales Rep	The sales representative managing the prospect account.
Lead Type	N/A
Proposal ID	The proposal identification number.
Last Activity	The most recent activity completed on this account.
