

# Call Attempts Pipeline Process Training 2024

## Objective:

The Call Attempts Pipeline Process aims to efficiently manage leads through various stages of engagement until they are successfully booked for an appointment or marked as 'Do Not Disturb' (DND). This document provides a step-by-step guide on how to effectively utilize the pipeline process for making calls.

## Process Overview:

### Creation of Smartlist Filters:

- The first step involves creating smartlist filters to streamline the process of selecting leads for calls.
- Filters include Pipeline Stage, CC Assigned Users, City, and DND status.
- Pipeline stages are categorized into Day 1, Day 2, and Day 3.
- CC assigned users allow agents to filter leads assigned to themselves.
- City filter specifies Las Vegas and/or Henderson.
- DND filter excludes leads marked as 'Do Not Disturb' for all channels.

### Daily Lead Movement:

- Each day, leads progress through the pipeline stages from Day 1 to Day 2 and Day 3.
- Leads can transition to the next stage upon unsuccessful attempts, pending follow-ups, or other criteria specified by the agents.
- If a lead is successfully booked for an appointment or marked as DND, it will be removed from the pipeline or assigned a task accordingly.
- The pipeline operates on a continuous circulation basis, meaning leads assigned to agents will move from one agent to another until one of the following conditions is met:
  - The lead is successfully booked for an appointment.
  - The lead is marked as 'Do Not Disturb' (DND).
  - A task is assigned to the lead for further action.

### Agent Assignment:

- Leads may be reassigned from one agent to another based on workload distribution or specific criteria.
- Agents need to ensure effective communication and coordination to prevent overlaps or gaps in lead management.

## Setting up the V2 Pipeline Smartlist:

1. Navigate to the Main Menu on the right side and select 'Contacts'.
2. From the Contacts menu, select 'Smartlist' and then choose 'ALL'.
3. On the right side of the window, locate 'More Filters' and click to show the Filters popup box.
4. Set the following filters:
  - i. Pipeline Stage is 'Call Attempts V2', and choose from the options Day 1, Day 2, or Day 3.
  - ii. CC Assigned User: Select your name from the dropdown list.
  - iii. City: Type 'Las Vegas' or 'Henderson'.
  - iv. DND: Is not 'Enabled for All Channels' to exclude leads marked as DND.
5. Save the smartlist as 'V2 Pipeline' or any desired name for future reference.

The screenshot shows the Odyssey Energy CRM interface. The sidebar on the left contains navigation options: Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Sites, Memberships, Reporting, Odyssey Portal, and AI assistant. The main area displays a list of contacts under the 'Smart Lists' tab. The 'More Filters' popup is open, showing filters for Pipeline Stage (Call attempts v2: Day 1), CC Assigned Users (John Molod), City (Las Vegas), and DND (Is not Enabled for All Channels). The 'Save as smart list' button is visible at the bottom of the popup. Red arrows numbered 1 through 9 point to specific UI elements: 1 points to the 'Contacts' menu item, 2 points to the 'Smart Lists' tab, 3 points to the 'ALL' filter, 4 points to the 'More Filters' button, 5 points to the 'Columns' dropdown, 6 points to the 'Tags' column, 7 points to the 'City' filter, 8 points to the 'DND' filter, and 9 points to the 'Save as smart list' button.

## Conclusion:

The Call Attempts Pipeline Process provides a systematic approach to manage leads effectively, ensuring timely follow-ups and maximizing the chances of successful engagements. By utilizing smartlist filters and adhering to the outlined process, agents can streamline their workflow and enhance productivity in lead management activities. The continuous circulation of leads ensures thorough coverage and facilitates efficient lead management across the team.