

Little Giant Marketing

Sales Stages Overview



NEW LEAD

DESCRIPTION

THIS WILL BE YOUR DEFAULT STAGE WHEN A NEW LEAD IS ASSIGNED TO YOU IN LITTLE GIANT.

WORKFLOW

LEADS ARE SENT A TEXT MESSAGE AND EMAIL INTRODUCTION.



PENDING CONTACT

STARTING 4 HOURS FROM BEING MOVED INTO THIS STAGE (BETWEEN 9AM - 5PM)

DESCRIPTION

THIS STAGE IS USED FOR WHEN YOU DO NOT HAVE ENOUGH INFORMATION TO QUOTE AND YOU NEED TO HAVE A CONVERSATION WITH THEM.

WORKFLOW

5 EMAILS AND 5 TEXT MESSAGES WILL BE SENT OVER 20 - 30 DAYS. IF NO RESPONSE, CONSUMER WILL AUTOMATICALLY MOVE TO X-DATED.

QUOTED STAGES

DESCRIPTION

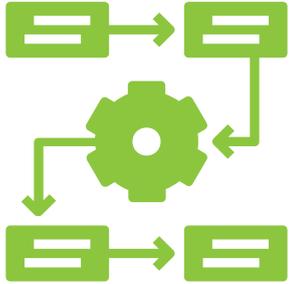
IF YOU ARE ABLE TO PROVIDE A QUOTE TO CONSUMERS, THIS IS YOUR MOST PRODUCTIVE AUTOMATION CAMPAIGN.

WORKFLOW

5 EMAILS AND 5 TEXT MESSAGES WILL BE SENT OVER 20 – 30 DAYS WITH YOUR "QUOTE DETAILS" POPULATED IN EMAILS. IF NO RESPONSE, CONSUMER WILL AUTOMATICALLY MOVE TO X-DATED.

PROCESS

YOU HAVE 2 OPTIONS WHEN SUBMITTING A QUOTE TO A LEAD. EITHER YOU WANT TO SEND THE QUOTE DETAILS IMMEDIATELY, OR WAIT 1 DAY BEFORE SENDING IT (TOMORROW).



Quote Follow-up

Start quote details workflow immediately

Start quote details workflow tomorrow

Quote Details

Your quote comes up to 104/monthly

IN NEGOTIATION/SCHEDULED CALL

DESCRIPTION

THIS IS OUR "SAFETY" STAGE. NO AUTOMATION HAPPENS AND IS COMPLETELY DEPENDENT ON YOUR FOLLOW-UP AND MOVING THEM OUT OF THIS STAGE.

COMMONLY USED IF THE CONSUMER TOLD YOU TO FOLLOW-UP A SPECIFIC TIME OR YOU ARE GETTING BACK TO THEM WITH REQUESTED INFORMATION.

WORKFLOW

IF YOUR CONTACT IS IN THIS STAGE FOR 10 DAYS, THE OWNER WILL RECEIVE A TASK NOTIFICATION TO MAKE SURE THE CONTACT SHOULD BE MOVED TO ANOTHER STAGE OR STAY.



MISSING QUOTE INFO

DESCRIPTION

IN THIS STAGE IS USED WHEN YOU CANNOT PROVIDE A QUOTE YET BECAUSE KEY DETAILS ARE MISSING. INSTEAD OF KEEPING THE LEAD IN PENDING CONTACT OR QUOTED PREMATURELY, MOVE THEM INTO MISSING QUOTE INFO AND ENTER THE SPECIFIC INFORMATION NEEDED TO CONTINUE (EXAMPLE: VIN NUMBER, SPOUSE DATE OF BIRTH, DRIVER DETAILS, PRIOR INSURANCE INFO).

THIS STAGE ENSURES CLEAN PIPELINES, PREVENTS STALLED LEADS, AND AUTOMATES YOUR FOLLOW-UP UNTIL THE MISSING INFORMATION IS RECEIVED.

REQUIRED FIELD

WHEN MOVING A PROSPECT INTO THIS STAGE, YOU MUST COMPLETE THE “MISSING QUOTE INFO” REQUIRED FIELD WITH THE EXACT DETAILS NEEDED FROM THE CONSUMER.

EXAMPLES INCLUDE:

- “NEED VIN # FOR 2019 TOYOTA CAMRY”
- “MISSING SPOUSE DOB”

- “NEED PRIOR INSURANCE CARRIER & EXPIRATION DATE”

IF THIS FIELD IS LEFT BLANK, THE SYSTEM WILL NOTIFY YOU AND PREVENT THE WORKFLOW FROM RUNNING.

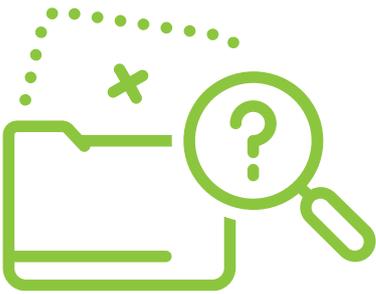
WORKFLOW

ONCE THE STAGE IS UPDATED AND THE REQUIRED FIELD IS COMPLETED, THE PROSPECT IS AUTOMATICALLY ENROLLED IN A FOLLOW-UP SEQUENCE:

- 5 SMS MESSAGES
- 5 EMAILS

SENT OVER 20–30 DAYS, REMINDING THE CONSUMER TO PROVIDE THE MISSING INFORMATION SO YOU CAN COMPLETE THEIR QUOTE.

THIS ENSURES CONSISTENT FOLLOW-UP WITHOUT MANUAL EFFORT.





PROCESS

- 1.MOVE THE PROSPECT TO MISSING QUOTE INFO.
2. ENTER THE REQUIRED MISSING DETAILS IN THE PROVIDED FIELD.
3. CLICK UPDATE TO ACTIVATE THE WORKFLOW.
4. THE PROSPECT RECEIVES AUTOMATED OUTREACH UNTIL:
 - THEY REPLY WITH WHAT YOU NEED, OR
 - YOU MANUALLY MOVE THEM INTO A NEW STAGE.
5. IF NO ENGAGEMENT HAPPENS AND THEY REMAIN IN THIS STAGE THROUGH THE FULL FOLLOW-UP WINDOW, THE SYSTEM WILL AUTOMATICALLY MOVE THEM TO X-DATED.

PRO TIP

USE THIS STAGE AS YOUR “PRE-QUOTE SAFETY NET.” IT KEEPS YOUR QUOTED STAGE CLEAN, PREVENTS INACCURATE DATA, AND ENSURES EVERY PROSPECT IS FOLLOWED UP WITH UNTIL THE QUOTE CAN ACTUALLY BE COMPLETED.

MISSING DETAILS

DESCRIPTION

THIS STAGE IS USED WHEN REQUIRED FIELDS WERE NOT COMPLETED IN THE QUOTED, X-DATED, BAD LEAD, OR POLICY SOLD STAGES. IT ACTS AS A SYSTEM-GENERATED "HOLDING ZONE" UNTIL YOU COMPLETE THE MISSING INFO.

TRIGGER

IF A REQUIRED FIELD IS LEFT BLANK, THE SYSTEM WILL AUTOMATICALLY MOVE THE OPPORTUNITY BACK HERE AND NOTIFY THE OWNER TO UPDATE IT

PROCESS

ONCE THE MISSING FIELD IS COMPLETED (EXAMPLE: QUOTE SUMMARY, FOLLOW-UP TIMING, X-DATED REASON, ETC.), YOU'LL NEED TO MANUALLY MOVE THE OPPORTUNITY BACK INTO THE CORRECT STAGE.

PRO TIP

THINK OF THIS AS YOUR REMINDER BOARD - CLEAN IT OUT DAILY TO KEEP YOUR PIPELINE FLOWING!

REQUIRED FIELDS BY STAGE

•QUOTED STAGE

- FOLLOW-UP TIMING (IMMEDIATE OR TOMORROW)
- QUOTE SUMMARY (IN QUOTE DETAILS FIELD)

•X-DATED STAGE

- X-DATED REASON

•BAD LEAD STAGE

- BAD LEAD REASON

•POLICY SOLD STAGE

- OPPORTUNITY VALUE (POLICY PREMIUM)



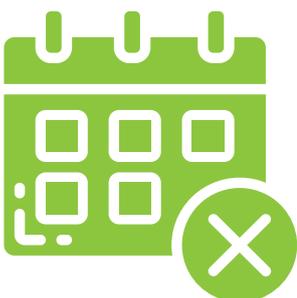
MISSED APPOINTMENT

DESCRIPTION

YOU CAN USE THIS STAGE TO TRIGGER AN EMAIL AND TEXT MESSAGE TO A CONTACT WHO DIDN'T SHOW UP TO AN APPOINTMENT.

WORKFLOW

YOU'LL STILL NEED TO MAKE YOUR CALL FOLLOW-UPS. YOU CAN THEN MOVE THE LEAD TO A NEW STAGE THE NEXT DAY.



X-DATED



DESCRIPTION

WHEN A CONSUMER ISN'T A FIT, MOVING THEM TO X-DATED WILL PUT THEM IN A FUTURE FOLLOW-UP CAMPAIGN.

WORKFLOW

IF AUTO/HOME EXPIRATION DATE IS PRESENT, EMAIL AND TEXT MESSAGE FOLLOW-UP WILL START 31 DAYS BEFORE THAT SPECIFIC DATE. YOU WILL ALSO RECEIVE AN EMAIL NOTIFICATION ONCE THIS PROCESS STARTS (THIS NOTIFICATION CAN BE TURNED OFF IF PREFERRED).

PROCESS

WHEN YOU X-DATED A LEAD, YOU'LL NEED TO UPDATE THE X-DATED REASON FIELD AS WELL. THIS HELPS WITH REPORTING AND CLOSING DEALS LATER ON.

POLICY SOLD

PROCESS

WHEN YOU MOVE A LEAD TO POLICY SOLD, YOU'LL NEED TO UPDATE THE OPPORTUNITY VALUE FIELD AND ALL OTHER CUSTOMER RELATED FIELDS.

REMEMBER TO INSTALL OUR CONFETTI CHROME EXTENSION TO LET EVERYONE KNOW YOU MADE A SALE! IN YOUR LGM MENU, GO TO "CONFETTI EXTENSION".



BAD LEAD/DNC

DESCRIPTION

THIS IS A LEAD THAT SHOULD BE RETURNED FOR CREDIT TO THE LEAD PROVIDER

PROCESS

WHEN YOU MOVE A LEAD TO BAD LEAD, YOU'LL NEED TO UPDATE THE BAD LEAD REASON FIELD AS WELL. THIS HELPS WITH REPORTING AND MAKING LEADS BETTER.

