

## **HOW-TO GUIDE**

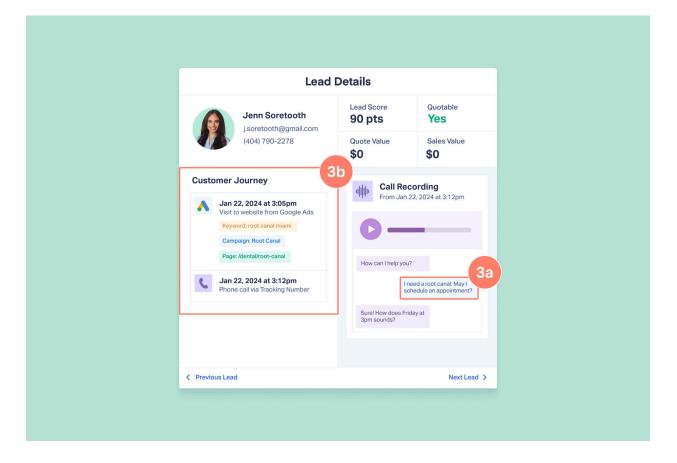
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## **Qualify, Categorize, & Value Leads**

Follow a Daily Qualification Process – Dentist's Office Example

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Client View	Sales Int	box Zero	larketer Lead	Analysis More V	∕iews ↓		
Showing 19	9 Leads	Quotable: Not Se	× Clear All ×	Exact Match 🕜			
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- 1. Switch to the Sales Inbox Zero view to show all not yet qualified leads
- 2. Open the Lead Details Page on your first lead



- Use Customer Journey and engagement data to determine if the lead is qualified
  - a. Are they interested in an offered service? Yes
  - b. Did they come from a PPC campaign? Yes

Jenn Soretooth   j.soretooth@gmail.com   (404) 790-2278     Quotable   Yes   Quotable   Yes   Sales Value   \$1,250        Sales Value   Sales Value   Sales Value   Sales Value   Sales Value   Sales Value <th colspan="5">Lead Details</th>	Lead Details				
(404) 790-2278       Sales Value         (404) 790-2278       Sales Value         (1,250)       \$1,250         (1,250)       Sales Value         (1,250)       Sales Value     <		90 pts Yes			
Jan 22, 2024 at 3:05pm         Visit to website from Google Ads         Keyword: root canal miami         Campaign: Root Canal         Page: /dental/root-canal         More call via Tracking Number         Jan 22, 2024 at 3:12pm         Phone call via Tracking Number         Custom Fields         Appointment Status       Booked         Procedure       Root Canal		Quote value Sales value			
Campaign: Root Canal         Page: /dental/root-canal         Jan 22, 2024 at 3:12pm         Phone call via Tracking Number         Lustom Fields         Appointment Status       Booked         Procedure       Root Canal	Jan 22, 2024 at 3:05pm				
Phone call via Tracking Number Custom Fields Appointment Status Booked Procedure Root Canal	Campaign: Root Canal	How can I help you?			
Custom Fields     Surel How does Friday at 3pm sounds?       Appointment Status     Booked       Procedure     Root Canal	Phone call via Tracking Number	schedule an appointment?			
Procedure Root Canal	Custom Fields	Sure! How does Friday at			
	Procedure Root Canal	]			

- Fill out your Custom Fields to categorize leads (e.g., Procedure: Root Canal)
- Add a Quote Value based on the Procedure (e.g., Root Canal is a \$1,250 job on average)
- Move on to the next lead and repeat the process until you reach inbox zero