

HOW-TO GUIDE


Qualify Leads

1

Can You Qualify Leads? – Example

What criteria can you use to tell which leads are most likely to become customers?

Lead Details

 Jenn Soretooth j.soretooth@gmail.com (404) 790-2278	Lead Score 90 pts	Quotable Yes
	Quote Value 0	Sales Value 0

Customer Journey 2

- Jan 22, 2024 at 3:05pm**
Visit to website from Google Ads
Keyword: root canal miami
Campaign: Root Canal
Page: /dental/root-canal
- Jan 22, 2024 at 3:12pm**
Phone call via Tracking Number

Call Recording 1
From Jan 22, 2024 at 3:12pm

How can I help you?
I need a root canal. May I schedule an appointment?
Sure! How does Friday at 3pm sounds?

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Example – a lead is qualified if they:

1. Are interested in a service you offer
2. Come from a PPC campaign

This lead is **Quotable**.

2

Can You Categorize Leads? – Example

How can you organize your leads into different categories (requested service, new vs. existing customers, etc.)?

Lead Details

Jenn Soretooth
j.soretooth@gmail.com
(404) 790-2278

Lead Score: **90 pts**
Quotable: **Yes**

Quote Value: **0**
Sales Value: **0**

Customer Journey

Jan 22, 2024 at 3:05pm
Visit to website from Google Ads
Keyword: root canal miami
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Page: /dental/root-canal

Jan 22, 2024 at 3:12pm
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Call Recording
From Jan 22, 2024 at 3:12pm

How can I help you?
I need a root canal. May I schedule an appointment?
Sure! How does Friday at 3pm sounds?

Custom Fields

Appointment Status	Booked
Procedure	Root Canal

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This lead:

1. Came from a “Root Canal” campaign
2. Mentioned they’re interested in a root canal service

This lead should be categorized as a **root canal patient** using **Custom Fields**.

Create your own from **Profile Settings**.

3 Can You Value Leads? – Example

How much are different leads worth?

Lead Details

 Jenn Soretooth j.soretooth@gmail.com (404) 790-2278	Lead Score 90 pts	Quotable Yes
	Quote Value \$1,250	Sales Value \$1,250

Customer Journey

- Jan 22, 2024 at 3:05pm**
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Keyword: root canal miami
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I need a root canal. May I schedule an appointment?
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Custom Fields

Appointment Status	Booked
Procedure	Root Canal

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This lead:

1. Quotable
2. Interested in a root canal (a \$1,250 service)

Since the lead is **likely to become a customer** and interested in a **root canal**, you can set its value to **\$1,250**.