

# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (1/3)



Maximize your productivity and reduce downtime by using a Dialer Integration. Learn More

LeadCENTER KRISTAN BROCKMAN I'm Available

Marketplace Campaigns **Manage Leads** Manage Agents Coupons Vouchers FAQ

Search by First Name, Last Name or Lead ID Import Create Lead

Date Generated: Last 90 days Lead Owner: KRISTAN BROCKMAN

Life Health

Login at Integrity Clients to manage your leads.

Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Purchased Date
TIING LIAN	New	Newton, MO	KRISTAN BROCKMAN	Direct Mail Aged Mortgage Protection Lead	09/25/2024
Javier Jasso	New	El Paso, TX	KRISTAN BROCKMAN	Equis A IVR Lead	09/04/2024
Danika Holguin	New	Doña Ana, NM	KRISTAN BROCKMAN	Equis A IVR Lead	09/03/2024
ALBERTO RUIZ	New	Collin, TX	KRISTAN BROCKMAN	Equis Direct Mail Overflow Lead	08/28/2024

Results per page: 20 1-4 of 4

**Step 1: On the left side, click "Manage Leads". All purchased leads will appear.**

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**Step 2: There are different filters you can select to view your leads.**

Helping agents reach their full potential and manage leads through Integrity. Get Started

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Results per page: 20 1-4 of 4

**Step 3: To view a lead, click the name of the lead (blue font).**

# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (2/3)



Helping agents reach their full potential and manage leads through Integrity.

Lead ID: 43583857

Lead Type: Direct Mail Aged Mortgage Protection Lead

Created Date: 08/01/2023

Purchased Date: 09/25/2024

Assigned Date: -

Last Modified: 09/26/2024

Premium Sold: -

Vendor Notes: [Zip: 9641] [Lender: OMB BANK] [Mortgage Amount: 831000]

Client Details:

First Name*	Last Name*	Business Name	Gender
TIING	LIAN	Equis Financial, LLC.	Male
Date of Birth	Client Age	Address Line 1	Address Line 2
01/01/1960	64	17161 TERRIER RD	-

**Step 4: To view lead, click "Template"**

Search by First Name, Last Name or Lead ID

Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Purchased Date
<input type="checkbox"/> TIING LIAN	New	Newton, MO	KRISTAN BROCKMAN	Direct Mail Aged Mortgage Protection Lead	09/25/2024
<input type="checkbox"/> Javier Jasso	New	El Paso, TX	KRISTAN BROCKMAN	Equis A IVR Lead	09/04/2024
<input type="checkbox"/> Danika Holguin	New	Dofa Ana, NM	KRISTAN BROCKMAN	Equis A IVR Lead	09/03/2024
<input type="checkbox"/> ALBERTO RUIZ	New	Collin, TX	KRISTAN BROCKMAN	Equis Direct Mail Overflow Lead	08/28/2024

**Step 5: Check box next to the name of leads you wish to export and/or print. Click the export icon to export selected leads into the format of your choice. Formats include csv, excel, or PDF.**

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<input type="checkbox"/> ALBERTO RUIZ	New	Collin, TX	KRISTAN BROCKMAN	Equis Direct Mail Overflow Lead	08/28/2024

**Step 6: To complete dispositions and/or use the features in Integrity Clients, click "Integrity Clients".**

# MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (3/3)



INTEGRITY

Dashboard | **Contacts** | Learning Center | Hi Available

Good Afternoon,

Client Snapshot

- New: 8
- Contacted: 0
- Engaged: 0
- Client: 4
- Retained: 0
- Loyal: 0
- Lost: 0

Policy Snapshot

Declined: 0 | Applied: 0 | Issued: 0 | Unlinked: 0

There is no policy information available for you at this time.

Task List

Plan/Enroll Leads: 1 | Reminders: 0 | Unlinked Calls: 2

Skylar Brockman  
kabrockman34@gmail.com

Date Requested: 04/19/2024 at 11:04 am

Stage: New

View Contact

Step 7: Click "Contacts".

INTEGRITY

Dashboard | **Contacts** | Learning Center | Hi Available

Back | **Contacts** | Import | Add New

Search

Name	Stage	Tags	Life	Health
Clint Hess	Client	WIC		
Randy Reinders	Client			
Kristan Brockman	New			
Alaina Forslund	New			
Daniel Kauf	New			
Miab Meeker	New			
Bill Murfin	Client			

Getting Started Guide  
Dashboard

The Dashboard screen in Integrity is designed to give agents an up-to-date overview of their book of business. It includes the Client Snapshot, Policy Snapshot, Task List, and Activity Stream.

**Client Snapshot**

Each Contact record in Integrity has a value assigned in the Stage dropdown. The Stage value is updated either automatically by Integrity or manually by the agent, to help the agent track the Contact's progress through the sales cycle. On the left side of the Dashboard screen, the Client Snapshot quickly takes agents to a filtered list of all Contacts in a certain stage - like New or Contacted - so it's easier for the agent to find and follow up with their Contacts.

**Note:** Default value for new Contacts added to Integrity. Usually used for new leads.

**Contacted:** Contacts the agent has reached out to are automatically updated to this stage if:

- There are one or more call recordings linked to the Contact record (either incoming or outgoing)
- And / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).

Agents can set update Contacts to this Stage manually if it's not done automatically.

**Engaged:** A Contact with one of the following actions completed:

- Signed SGA (Health Contacts)
- Completed SGA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

**Client:** The agent has sold one or more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.

**Retained:**

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy (based on effective dates)

Good Morning, Rachel

Client Snapshot

- New: 3
- Contacted: 8
- Engaged: 13
- Client: 13
- Retained: 13
- Loyal: 13
- Lost: 35

Policy Snapshot

Declined: 3 | Applied: 8

Issued: 34 | Unlinked: 7

Step 8: Use the client snapshot to track client activity and complete dispositions.