

CRM Status Descriptions

Pre-Sale

New Lead: Lead just requested a quote; email goes out

Contact Attempt 2: You made your first call and are ready for the second; email and text goes out

Contact Attempt 3: You made your second call and are ready for the third; email goes out

Contact Attempt 4: You made your third call and are ready for the fourth; no texts/emails go out

Contact Attempt 5: You made your fourth call and are ready for the fifth; email goes out

Contact Attempt 6: You made your fifth call and are ready for the sixth; no texts/emails go out

Contact Attempt 7: You made your sixth call and are ready for the seventh; no texts/emails go out

Contact Attempt 8: You made your seventh call and are ready for the eighth; email goes out

Contacted - Appt Set: You have set an appointment with the client for a specific date and time; make sure to change the TASK DUE time in the lead; no text/email

Contacted - Not Quoted: You spoke with the prospect (call, text, or email) but have not quoted them yet; no text/email

Contacted - Quoted: You have quoted the prospect; no text/email

Quoted - Send App Link: This will send out the self-completion link for whatever you quoted them; email with link goes out

Cool lead 1: You have finished your contact attempts and the lead has “cooled,” but you are still reaching out; email goes out

Cool lead 2: You have made your first cool-lead call and are ready for the second; no text/email

Cool lead 3: You have made your second cool-lead call and are ready for the third; email goes out

Pending

Application Sent for Signatures: You send an e-app to the client to sign, they have not signed yet; no text/email

Application Signed and Submitted: Prospect has signed the app and it has been submitted to carrier; no text/email

Approved: Carrier approved the case; no text/email

Issued: The case has been issued; no text/email

In Force: The case has gone in force; no text/email

Withdrawn

Declined: The Carrier declined the case; no text/email

Lapsed/NSF: The premium payment did not go through and/or the policy has lapsed; no text/email

Not Interested - Quoted: You quoted the prospect, but they do not want to move forward; no text/email

Not Interested - Not Quoted: You did not quote the prospect and they do not want to move forward; no text/email

Not Interested - NTO: The carrier offered a policy, but the prospect did not accept it (common if the carrier came back graded/rated when client was expecting level/a better rating class); no text/email

Not Interested - Post Sale: Client chose to not move forward before the carrier made a decision; no text/email

Do Not Call List: The client asks to be put on the Do Not Call list; no text/email

Withdrawn - Bogus: The phone number is bogus/disconnected; email goes out

Withdrawn - No Contact: You went through all the Contact Attempts and Cool Lead statuses and have not made contact with the prospect; no text/email

Withdrawn - Nurture: You made contact with the prospect at some point, but are now unable to reach them after several attempts; no text/email

Withdrawn - Uninsurable: Does not qualify for any carrier; no text/email

Withdrawn - Duplicate: You accidentally created two of the same lead; no text/email

Withdrawn - Test lead: For test leads you create so they don't show up in your lead queue; no text/email