Lead Assignment

Introduction

Leads are assigned to users through the simultaneous shotgun distribution method that is built-in to the Workflow Engine feature rules that determine what users qualify for lead assignment. Shotgun lead distribution is the term used to describe a simultaneous lead circulation method that occurs through the dialer feature. Each user is notified of the incoming lead phone call at the same time when the lead reaches out through the dialer. The first user to answer and accept the call wins and is assigned that lead.

Lead Acceptance Process Using the Dialer

- Answer the incoming call. A messaging stating the following is read:
  - You have an available lead [Firstname Lastname]. Press 1 to accept or hang up to decline.
- The first user to press 1 wins the distribution handoff of the lead. The user also receives an email notification that the specific lead has been assigned to them. The Total Expert CRM reflects that the lead is assigned to the user.
- The assigned user is read another message:
  - You have been assigned [Firstname Lastname], press 1 again to be connected or hang up if you plan to reach out later.
- Pressing 1 makes an immediate outbound call to the lead.
- Users that did not win the lead get the following message:
  - We're sorry, but that lead is no longer available.

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New Lead was Distributed to You

Hi Scott,

You have been assigned a lead:

- **Name:** Sequential Test2
- **Lead Source:** Team Source

View and engage with your leads by clicking the button below.

View My Leads

Have a Question?

We're here to help.

✉ support@totalexpert.com

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