

LeadServ Quick Reference



Reference this document to ensure that you are dispositioning your leads in LeadServ correctly. It is imperative that you maintain accurate and up-to-date dispositions in LeadServ at all times.

Status	Definition
NEW	This is a brand new lead that has not been worked.
Attempting Contact	You have reached out to the lead at least once.
Appointment Set	You have set an appointment to meet with the lead- Nice!
In Process	You have completed the appointment with the lead and are in the process of writing an application for them.
Future Prospect	You have completed the appointment but determined there is nothing you can help the client with at the moment, but there is potential for a future sale.
Sold	You sold the client a product- Awesome job! Please complete the sold survey to let us know the carrier and product you sold to the lead.
Referred Out	You referred the lead to another agent due to not having the proper appointment to best help the client or for some other reason. Please indicate who it was referred to in the notes.
Bad Contact Information	The contact information for the lead is incorrect.
Not Interested	You tried to set an appointment with the lead and overcome their objections to meet but they still were not interested.
DO NOT CALL	The lead was belligerent and not interested in an appointment.
14 ATTEMPTS MADE	We recommend calling these leads 14 times, at a maximum of once per day, until they are dispositioned as either Sold, Future Prospect, Referred out, Bad Contact information, Not Interested, or DO NOT CALL. If in the rare instance you are not able to reach the lead at all after 14 attempts, this is the disposition you would use. The average health insurance lead takes 7 attempts at contact before contact is made.

Note: Incorrect dispositions and failure to disposition may result in an agent losing access to Preferred Advisors' lead programs. Without correct dispositions, Preferred Advisors cannot accurately assess a campaign's success, closing ratios, or other important metrics.