

Lead Status Definitions

Hot Lead – The lead has expressed interest and is ready for contact by a representative. A lead will remain Hot until we follow up and hear if they have any additional questions or have been helped.

- *I would love to hear more about how this solution can help my business.*
- *Yes, let's please set up a call. I would like to learn more.*
- *Please have Bob give me a call at (555) 555-5555.*
- *I'm very interested, please go ahead and send me some information.*

Lead to Review – The lead's reply needs to be reviewed to determine your representative's next action. This status is applied in situations when the lead provides an automatic reply, states confusion to the outreach, or would like to interact in a way that is outside the goal of the conversation. The primary conversation goal being whether contact was made, if information was provided regarding product(s), service(s), an event, etc.

- *I'm having technical issues with my device, can you connect me with your customer support department?*
- *I'm actually following up on a job application and not looking to purchase.*
- *Automatic Reply: We will contact you in 24-48 hours, if needed please contact name@examplecompany.com.*
- *I'm actually not Bob, I don't know how I ended up in your system.*

Further Action – The lead responded that they have further questions or that they were not contacted by the representative. If the representative can take action regarding the lead's needs, Further Action is applied. The lead is still in need of information and information provided by the lead is relevant for the representative to know.

- *No.*
- *What is the final price after the discount is applied?*
- *I don't think so.*
- *Thank you for following up. No, I have not heard from a representative yet.*

Satisfied - The lead responds positively, indicating completion of the customer's objective on the Intuitive conversation platform. They are already in discussion with a representative or already a customer. They have an appointment or have already visited with a representative. It needs to be clear that the lead has met the objective of the conversation.

- *Yes, I have been given the information. Thank you for your help.*
- *He did and we got it figured out.*
- *Yes, I spoke with Kathy yesterday.*
- *I have a meeting with Todd next week.*

Note: If the lead only says, "yes," they are not considered a Satisfied lead because there is less of a clear indication that they were helped, or they purchased the product from the corresponding representative or company. They must indicate that assistance was provided by a representative or provide further context to ensure they are fully satisfied.

Disqualified - Lead responded to the follow-up exchange indicating that they are not interested, have changed their mind, or purchased elsewhere. They most likely will not be interested in continuing the conversation.

- *I'm no longer in the market.*
- *I was contacted, but I'm not interested in buying.*
- *I changed my mind and I'm not interested.*
- *We purchased from someone else because your prices were too high.*

No Further Action - The lead does not need any further action but is not classified as Disqualified. There could be action on this lead at a later point, but they are not necessarily disinterested. Because the lead is not necessarily disinterested, the lead could be added to a Reengage campaign or another type of outreach.

- *Yes, thanks.*
- *Got it. Thanks!*
- *All good, thanks for checking.*