improve it 360
an EverCommerce Solution

eLead

Best Practices

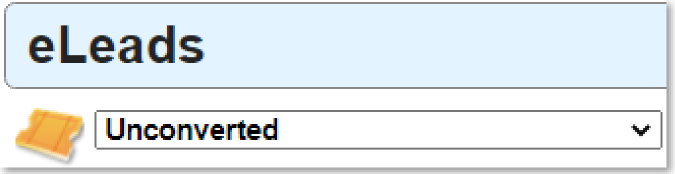
Agenda

- Why wouldn't an eLead be automatically converted?
- eLead Field Weighting – matching to existing Prospects
- Managing the Unconverted eLeads List
- Keep a clean Source list – no Duplicate Names, check for Active Owner
- Check for Sharing Rules! – 4 Sharing Rules are required for expected functionality
- Verify the Payload – how is your lead provider sending the data?
- Differences between Webhook and Emailed eLeads – fields and formatting
- Lead Credit Report and Marketing Opportunity Times Called

Why are some eLeads Unconverted?

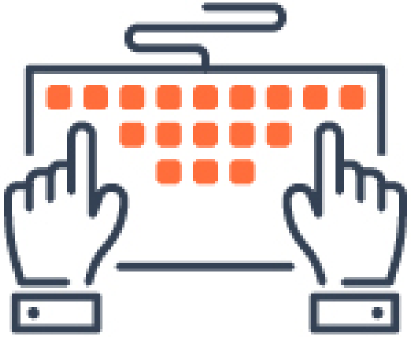
TWO REASONS

1. There is a possible match, but the system is unsure
2. There is not enough required data to convert to a Prospect



Required Fields

- Source Type
- Source Name
- Taken On Date
- Last Name
- First Name
- either an Email address OR a Phone number OR a complete Address



These leads require human interaction to determine if the lead is valid and should be added to the database.

Which eLead data is matched to Prospects?

A “Match” is 15 Points or more of matching data points
No Match is less than 7 Points & “Conversion Issue” check box will be checked

Email address = 16 Points

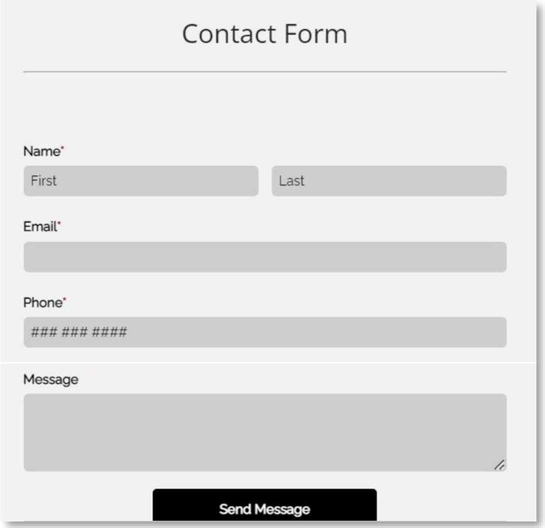
Phone = 11 Points

Last Name = 3.6 Points

First Name = 2.8 Points

Street Address = 1.3 Points

Zip Code = 1.1 Points



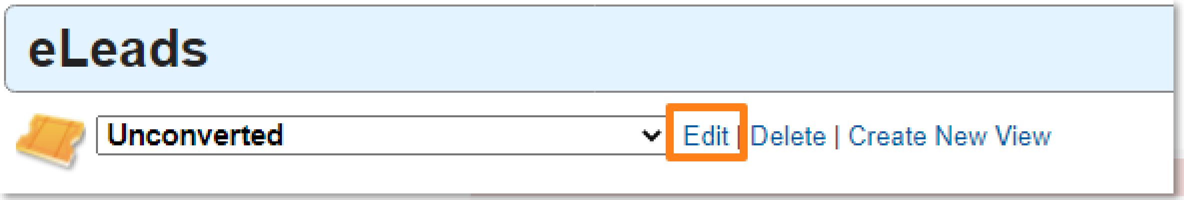
BEST PRACTICE:
Make **Email** address and **Phone** required fields on any of your webforms

Interest is not required until an Appointment

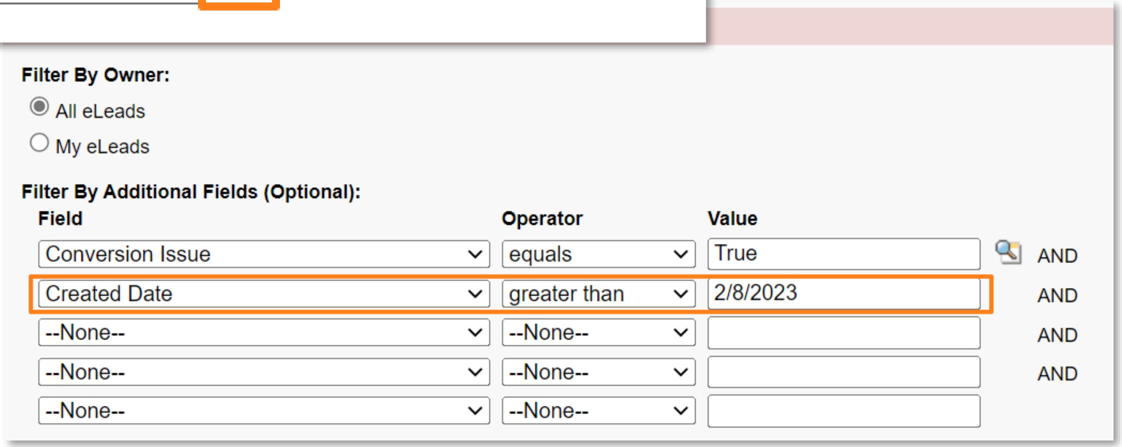
These weighted settings cannot be configured. They are standardized across all improveit 360 systems.

Unconverted eLeads

The Unconverted eLeads list view will continue to grow!
Add a field filter to exclude eLeads created before a specific date.

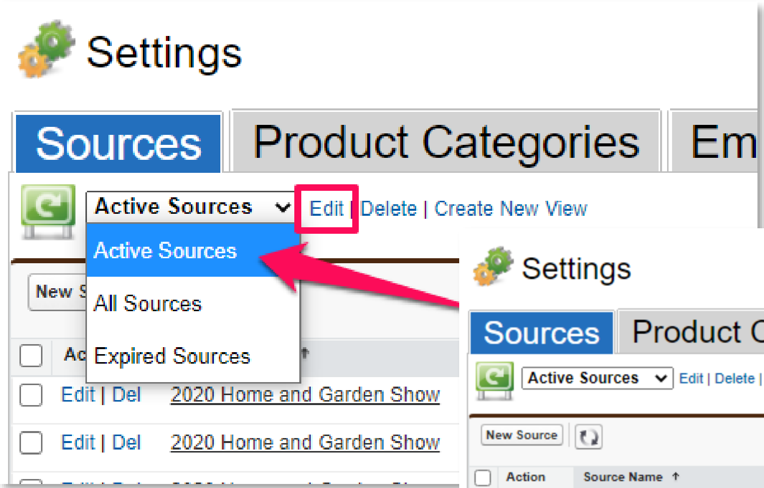


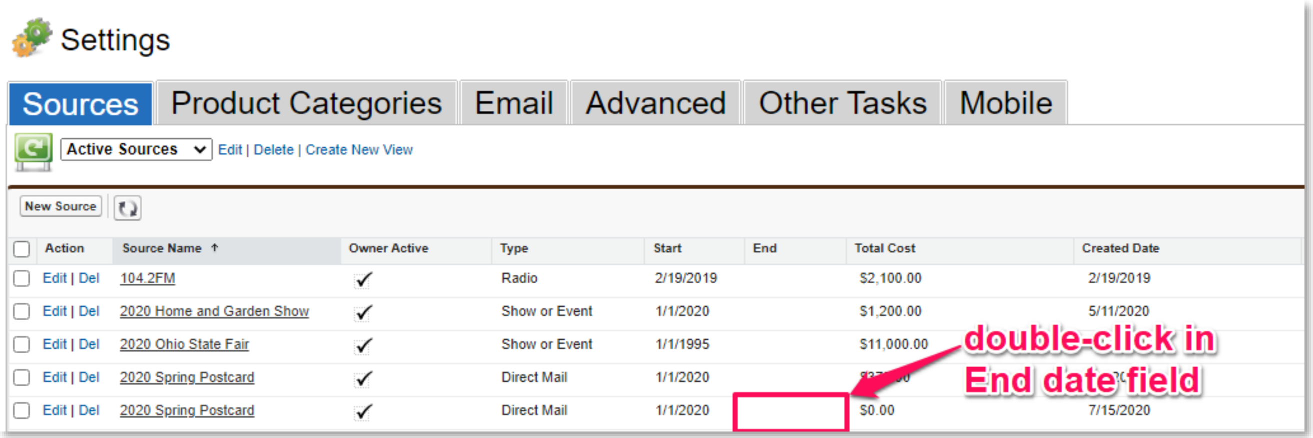
BEST PRACTICE:
Convert eLeads daily



Keep the list clean! Continue moving the date forward as you convert the legitimate leads to Prospects

Keep your Source list clean

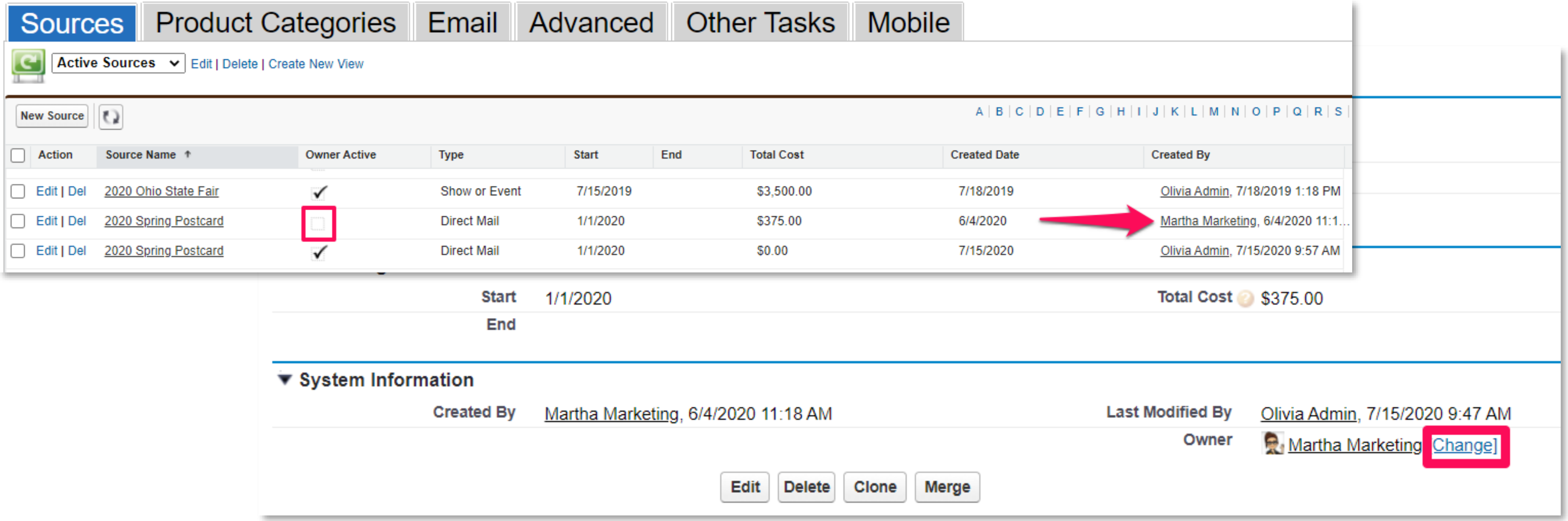




No Duplicate Names!

Change the Source Name (even if it has an End date) to prevent eLeads from being attributed to the wrong Source.

Make sure the Source “Owner” is an Active User



Add the Created By field to a List View. Notice anyone who is not an Active User? If you aren’t familiar with all your Users, follow along HERE to create an “Owner is Active” formula field on the Source object and change the Page Layout.

Check your system's Sharing Settings

The #1 Reason eLeads are not behaving as expected!

Limit of 50 Sharing Rules per Object

eLeads not converting to Prospects?

Prospect Sharing Rule

eLead is creating multiple Sources?

Source Sharing Rule

eLead gives an error when mapping Taker?

User Sharing Rule

Source Sharing Rules New Recalculate

Action	Criteria	Shared With
Edit | Del	Source: Source Name NOT EQUAL TO	TrainingSite Site Guest User

1 Rule per Object
- Account
- Source
- Prospect
- User

Also check out our complete Guide to eLeads Troubleshooting

Verify the Payload – what data is the lead provider sending?

Web-to-eLead - 2 formats accepted

HTTP Post Query string

FirstName=Gandalf&LastName=TheGrey&Phone1=1235551234&Phone1Type=Mobile&StreetAddress=456+The+Shire&City=Oxford&State=OH&Zip=45056&Email=1234@fake.com&SourceType=Lead+Provider&Source=Website&Interest=Roofing

JSON

```
{
"FirstName": “Gandalf",
"LastName": "TheGrey",
"Phone1": "1235551234",
"Phone1Type": "Mobile",
"StreetAddress": “456 The Shire",
"City": “Oxford",
"State": "OH",
"Zip": “45056",
"Email": "1234@fake.com",
"SourceType": "Lead Provider",
"Source": “Website",
"Interest": “Roofing"
}
```

Note: Phone number needs to be a 10-digit text string.

Product Category is “Interest” when using Web-to-eLead

Follow along with our Help Center article if you need to [Setup a Web-to-eLead Endpoint URL]

Verify the Payload – what data is the lead provider sending?

Email-to-eLead - 1 format accepted

Text string

Email Subject: Provider = Website
Email Body:

```
<?xml version="1.0" encoding="UTF-8"?>
<Lead>
<Email>1234@fake.com</Email>
<FirstName>Gandalf</FirstName>
<LastName>TheGrey</LastName>
<StreetAddress>456 The Shire</StreetAddress>
<City>Oxford</City>
<State>OH</State>
<Zip>45056</Zip>
<Product>Roofing</Product>
<Phone1>(123) 555-1234</Phone1>
<Phone1Type> Mobile</Phone1Type>
<Comments>A wizard is never late, nor is he early, he
arrives precisely when he means to.</Comments>
</Lead>
```

Note: Phone number must be formatted: (xxx) xxx-xxxx

If sent as text string the Phone number will end up in the Comments field

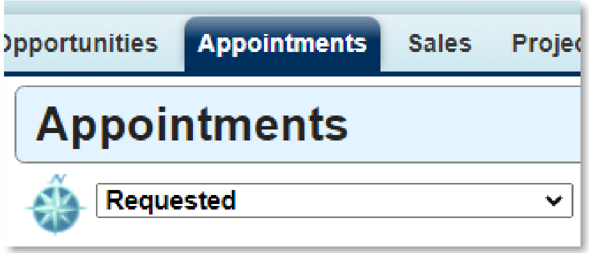
Product Category is “Product” when using Email-to-eLead

Follow along with our Help Center article if you need to [Setup Email-to-eLead Email Address]

Field Formatting

Did you know, your customer can request an Appointment on a specific Date and Time using an eLead?

Check out the Requested List on the Appointments Tab



Taker	The full name of the person who took the lead that will get populated on the new Lead Source. This has to match exactly with an existing Staff name. I.E. 'John Doe'. If no match is found it will be ignored.
Product (Email-to-eLead) Interest (Web-to-eLead)	Can be a single value or multiple separated values e.g. "Doors;Gutters;Windows." For best results, these values should match up with the 'Product Categories' in your system.
RequestApptonmentDate	(yes, RequestApptonment is misspelled - missing the letter "i". If you try to spell it correctly, the value will be placed in comments.) If populated, an Appointment is automatically created in the system with this date. The Appointment will have a special status of 'Requested' so they can filtered on easily. Must be in either YYYY-MM-DD or MM/DD/YYYY format.
RequestApptonmentTime	(yes, RequestApptonment is misspelled - missing the letter "i". If you try to spell it correctly, the value will be placed in comments.) If 'RequestAppointmentDate' is populated, this will further populate the time on that Appointment. Format must be h:mm tt (i.e., '7:30 PM').
Date	The date this lead was taken on in either YYYY-MM-DD or MM/DD/YYYY format. Defaults to current date.

Check out our complete Field Mapping Guide for all supported eLead Fields

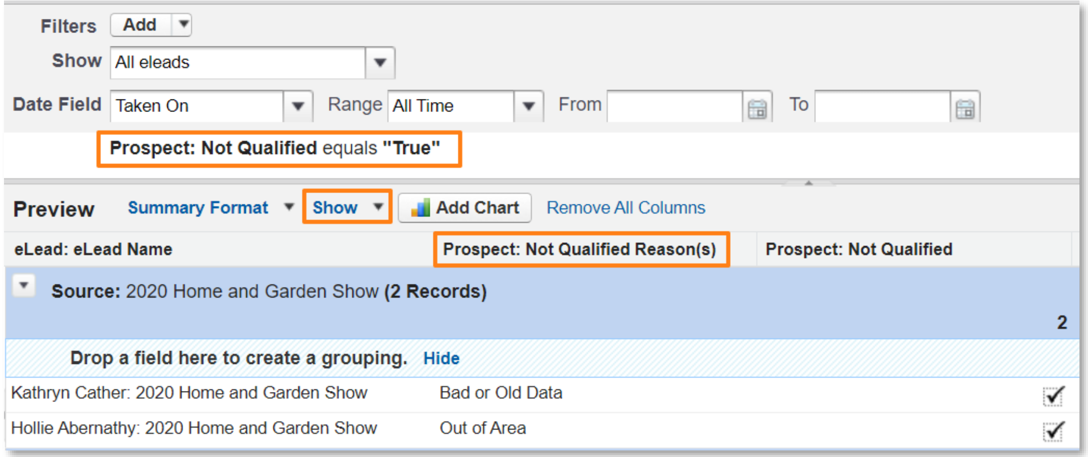
Pay per Lead - Lead Credit Report

Ask your Lead Providers if you can get a credit for Disqualified Leads!

Click Customize to add the Not Qualified Reason to the Report

Add a Field Filter to only see Disqualified Prospects in the Report

Click Show Details to see the Reason each Prospect was Disqualified



For more information on these Reports, visit our Help Center: [eLead and Lead Credit Reports]

How many times did we call the Prospect?

Lookup

Select the picklist values to add below.

Insert Selected

Deselect all

	Value
☐	New Marketing Task
☐	New Appointment
☑	Prospect Flagged - Not Qualified
☑	Prospect Flagged - TCPA
☑	Prospect Flagged - Wrong Number
☐	Prospect Merge
☑	Prospect Flagged - On "Do Not Call" registry

Add a Field Filter to show only Completed Reasons that are Prospect Flagged

Add a Grouping to summarize by Source

Pull in the Campaign Name and Times Called to see how many times, and from which Campaign the Prospect was called

	Marketing Opportunity Name	Taken On	Completed Reason	Times Called	Not Qualified Reason(s)	Campaign: Campaign Name
Source: Source Name: Facebook (1 record)						
				1		
Lewis, Alexander	Lewis, Alexander: Set Appointment	2/20/2019	Prospect Flagged - Not Qualified	1	-	Remarket
Source: Source Name: Home Depot #457 (1 record)						
				2		
Blaze, Jack	Blaze, Jack: Set Appointment	9/25/2021	Prospect Flagged - Not Qualified	2	Renter/Non-Owner	Reset
Source: Source Name: Instagram Hashtag Ad (2 records)						
				3		
Test, Greg	Test, Greg: Set Appointment	5/1/2020	Prospect Flagged - Not Qualified	2	Moved Away	Referrals: Intro Stage
Test, Greg	Test, Greg: Set Appointment	5/1/2020	Prospect Flagged - Not Qualified	1	Moved Away	Referrals: Ready to Set

Use Report Type: Prospects with Marketing Tasks with Campaigns

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**

2. Open a Ticket at: https://support.improveit360.com/

3. Or Email Us: support@improveit360.com

Support Office Hours:
Monday – Friday, 9am-5:30pm Eastern time