



# Return Portal Instruction and Role Design

## 1. OBJECTIVES AND GOALS

### Objectives of Lead Partner Returns

- Reducing cost per qualified appointment
- Reducing cost of low quality leads
- Keeping lead partners in check so they do not get comfy sending us low quality leads

### Goals in Returning Leads Each Month

- 100% return rate for all leads that fit each vendor's return criteria
- Incentive for a 100% return rate each month will be discussed with Scott in James's next meeting with him.

## 2. PROCESS AND PROJECTS

### Projects Coordination Sheet

- [https://docs.google.com/spreadsheets/d/1nSqHO4mTmDj6ZJK1izCBC\\_o13asu7Nde9A0OIdfChA0/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1nSqHO4mTmDj6ZJK1izCBC_o13asu7Nde9A0OIdfChA0/edit?usp=sharing)
- This'll be our home base for projects and keeping each other up-to-date. You can put relevant notes next to assignments and keep me up-to-date on how long projects are taking so we can make incentives for handling the return portals well commensurate to earnings while strictly an Inside Sales rep.

### Lead Vendor Portal Logins (Where you Go to Return Leads) and Account Contacts

- <https://docs.google.com/spreadsheets/d/1k3AlnUuWi6ZbcJS-Sd7loTPNIAVFQUzkmGM3Ire77CE/edit?usp=sharing>
- This document contains portal logins for each lead vendor, markets they're helping us in, account contacts, lead costs, and lead type (shared vs. exclusive). Copy James on all correspondence with account contacts to keep him in the loop. Have process be measuring invoice against total billed, excluding duplicates and invalids.

### Measuring Returns Against Invoices

- At the end of each month, send James a sheet of all leads returned to the vendor so he can measure it against the invoice total and make sure their billing is accurate and we're holding them accountable for not charging us for junk leads. James will make sure they send auto copies of invoices to you so you can measure them against invoice totals

### The Nature of the Lead Partner Relationship

- Every so often, an account contact will reach out to you or me to have us send them data that lets them "optimize" their campaigns. Historically, this has proven to be nothing

more than lip service. *How do I know this?* Because I used to send reports whenever an account contact requested them, and the campaigns never improved...You can ignore these requests for reports and campaign data unless I direct otherwise. I much prefer us analyzing the data from our end in terms of lead quality, and sending reports to them only when quality becomes a problem.

### **3. FINDING RETURNABLE LEADS IN ZOHO**

#### **Lead Sources with Returnable Leads that Must Be Done Manually, Lead by Lead /Portals Set Up**

- Grid Freedom, Acquire Solar Leads, Clean Energy Experts (CEE), Wave Solar (probably a few others I'm forgetting).
- Criteria varies, but generally things like Bad Lead - Out of Area, Didn't Request Info, not Homeowner, Bad Information, etc. are eligible for returns. Invalid return requested from Website can be ignored, as we generate them ourselves and therefore cannot return them to anybody to reduce the cost of a bill.
- Returning leads in a timely manner is important, because each vendor has a timeline for when they will accept returned leads and credit accounts for leads that were unworkable. They hope it takes us a long time so we miss the eligibility for return due date on each unworkable lead.
- In training, we will set up and save a filter (or create a bucket) for you in Zoho to measure leads needed to be returned based on Lead Status/Lead Status Detail (should also include "Other" Buckets).

#### **How to Know When a Lead Partner's Leads Are a Problem**

- If you ever see a lead partner lead source with a nominal cost per appointment above \$300 (nominal meaning it's not measured in conjunction with the labor needed to convert the lead into an opportunity), let me know and I'll take it from there. Don't start measuring that though until after I've completed the scale back on the sources (it'll be in phases, so it'll take a while for me to complete).
- In most instances, it is not worth fighting against a lead vendor's return policy because you view it as "unfair." They are uncompromising in their standards for returns (understandably so), and going against the grain of their return procedures only accomplishes them knowing you're upset with them, which still doesn't carry much weight, unfortunately.