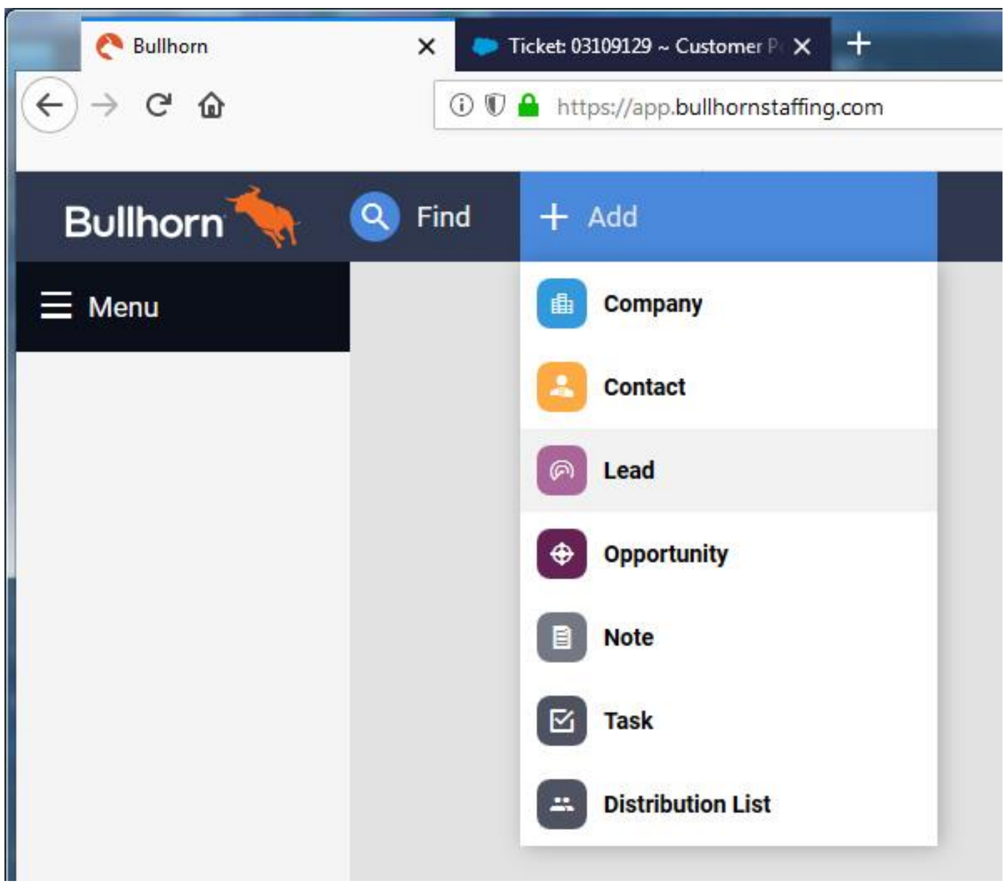
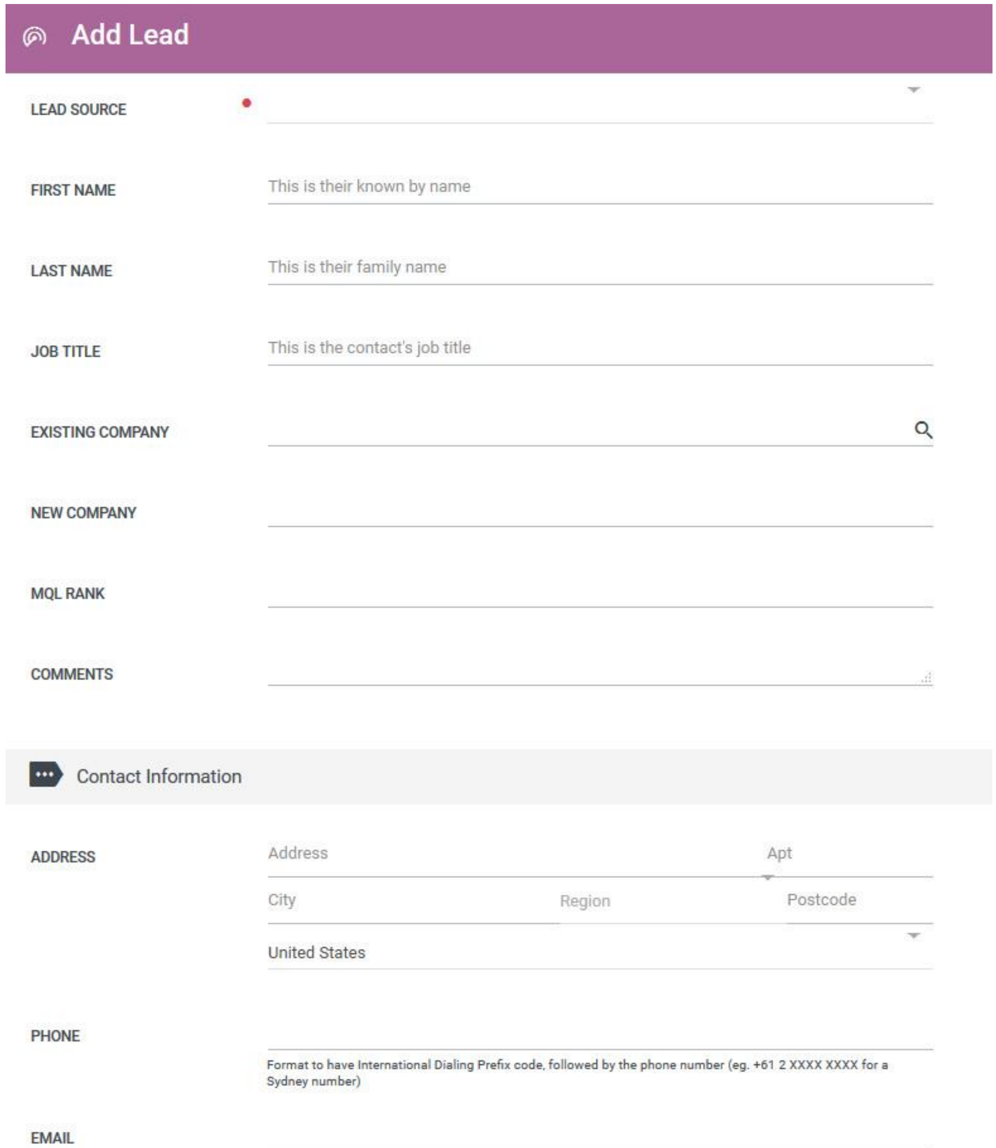
BULLHORN INSTRUCTIONS
Entering Leads

Question	Answer
What is a Lead?	• A **Lead** is a prospect that has not yet been qualified (e.g., a person or company for which you have little information and may be interested in PERSOLKELLY's services). • Leads come from a variety of sources including: Personal/ Existing Contacts, Client Referrals, Sales Calls, Client Referrals, Marketing Leads, KellyOCG, Global Solutions and expansion activities within current Accounts. • Even if the Lead is interested in PERSOLKELLY's solutions, the Lead does not become an **Company** and ultimately an **Opportunity** (sales deal) until researched and prequalified to determine if they would use PERSOLKELLY's products and services, and/or meet established sales objectives or criteria. • Sales representatives create a Lead record for their targeted customers; after dialogue with the prospect is established and there is a qualified opportunity
How do I start to enter a new Lead?	1. You can create a new lead by clicking on the +Add field and then clicking the lead field 

2. Complete as many fields as possible. **Click** Save when complete.



There are 2 fields that you have to input:

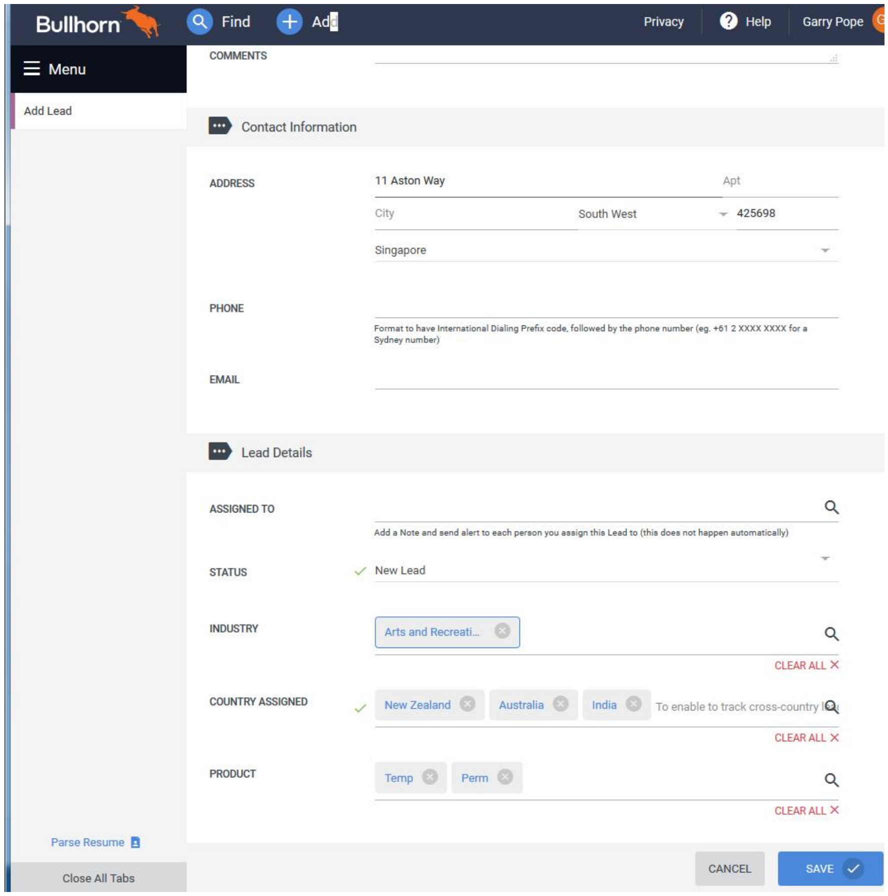
1. Lead Source (where the lead came from)
2. Country Assigned – you can assign your own country, or you can assign other Country/Countries.

You can enter as much or as little information as you know at the time of entry and then update it with more information as you get to know more about the lead.

The most important information to input (apart from the above) would be:

- First Name
- Last Name
- Job Title
- Existing Company or New Company
- Industry
- Status and
- Product

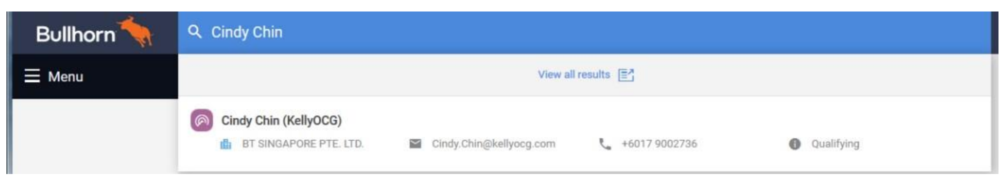
	Once you have entered in the information that you know – click the blue save button:



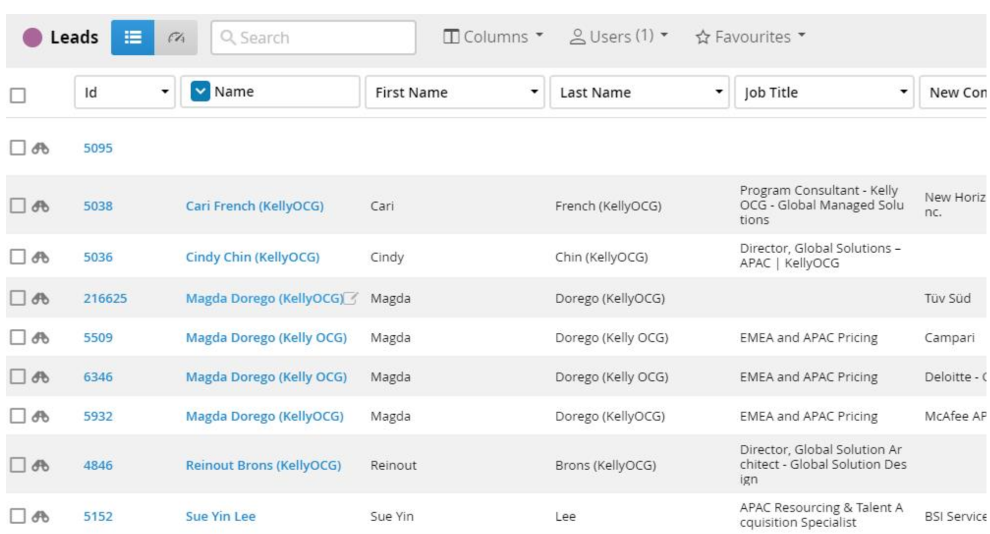
How do I go back to a Lead to update the record?

There are 2 ways to go back to a lead created and update the record:

1. You can search for the lead just click the Find field at the top right of Bullhorn, type in the name of your lead, select the lead you want to update



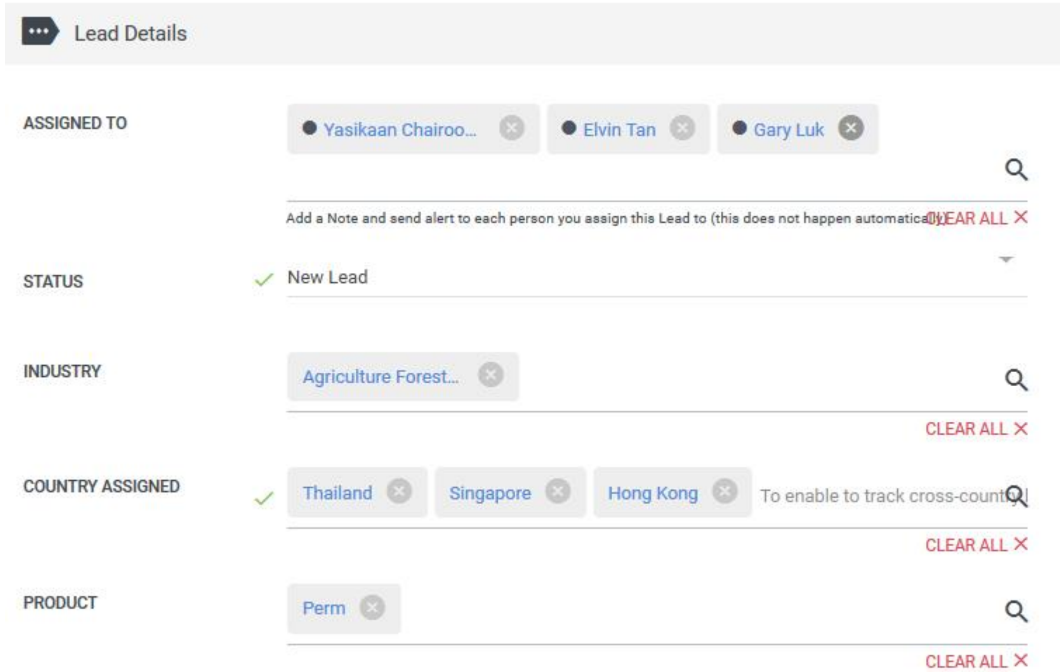
2. Click the menu field and then click leads, this will bring up a list of your leads, click on the lead you want to update



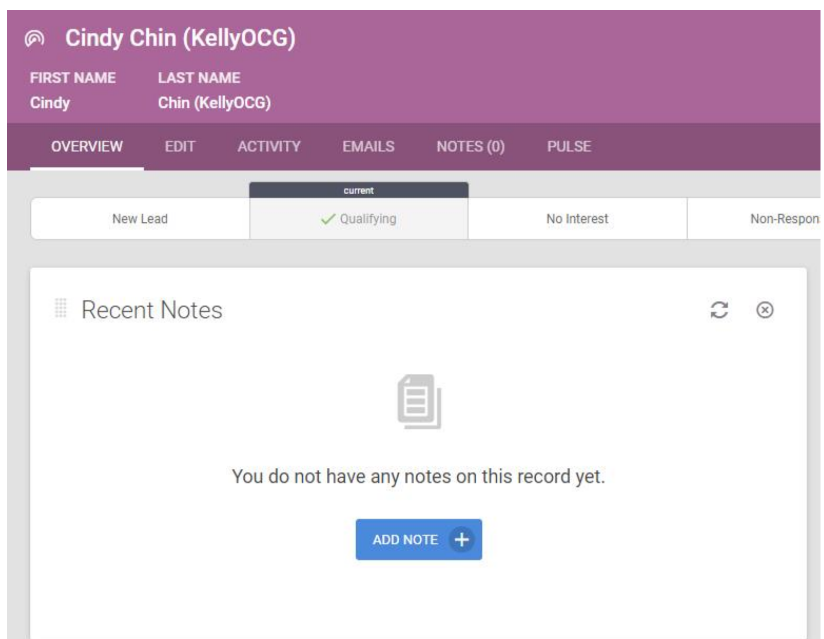
Cross Country Leads

How do I inform another country sales manager of a new lead?

When inputting cross country leads, please ensure that you fill in the Lead Details – including **Assigned To** and **Country Assigned:**



Important: To inform sales managers in other countries of a lead that they will need to work on, **__you must add a note,__** this sends an email to the sales manager to let them know about the lead. When you are in the Lead record – click add Note:



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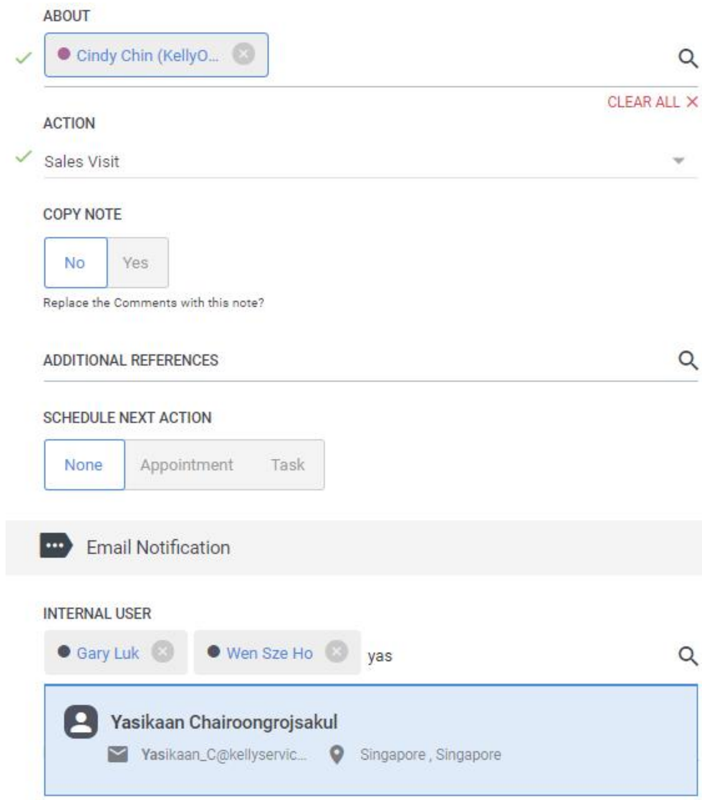
When creating a note please enter the following information:

1. Enter comments about the lead
2. Enter an Action that must be completed and
3. Assign Internal Users



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When do I convert a Lead into an Opportunity?

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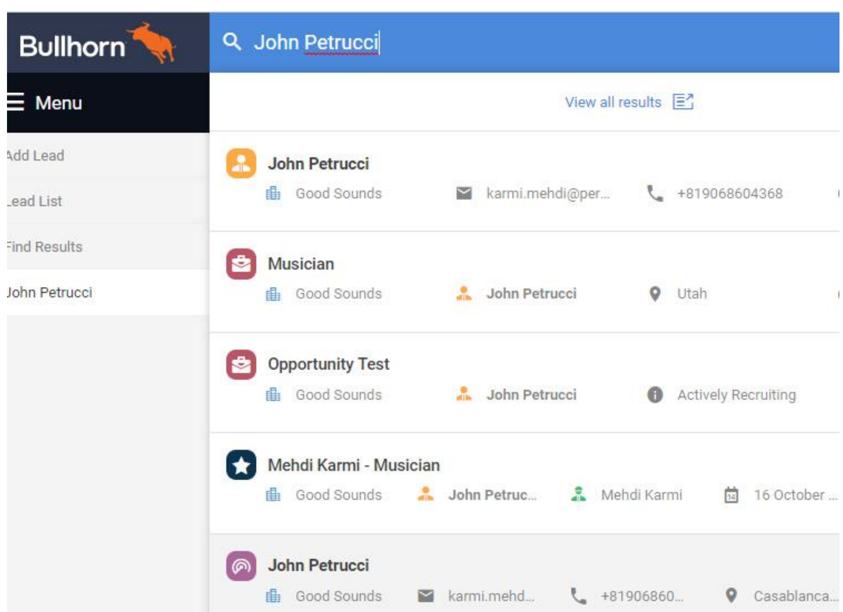
Once you establish initial dialogue with the Lead and there is an active sales opportunity to pursue, convert the Lead, creating an Opportunity:

1. Search for the appropriate **Lead.**
2. Click the name of a Lead record to view its details. The **Lead Detail** will display.



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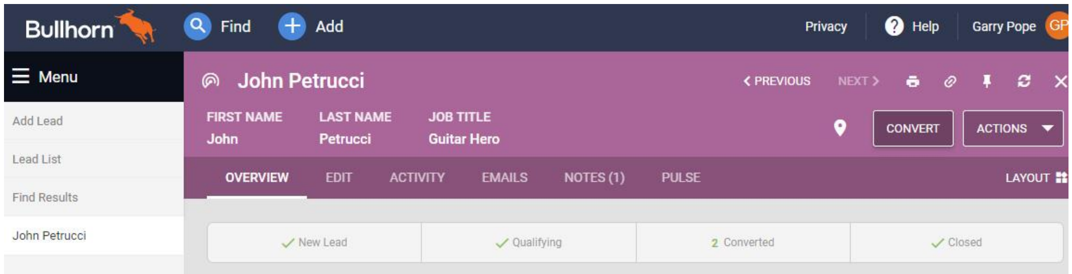
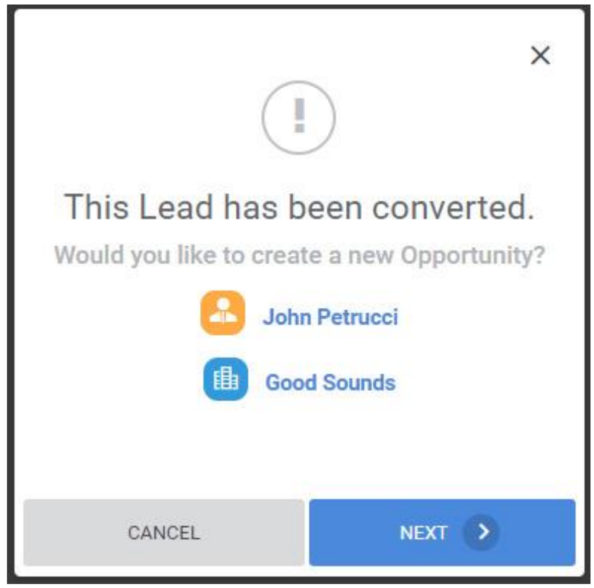
3. Click the **Convert** button at the top of the record. The **Convert Lead** page will display then click next.





4. Choose the type of Opportunity – the choices are Job, Branch, National and Regional

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What do I do if the lead is non responsive and there is no opportunity?

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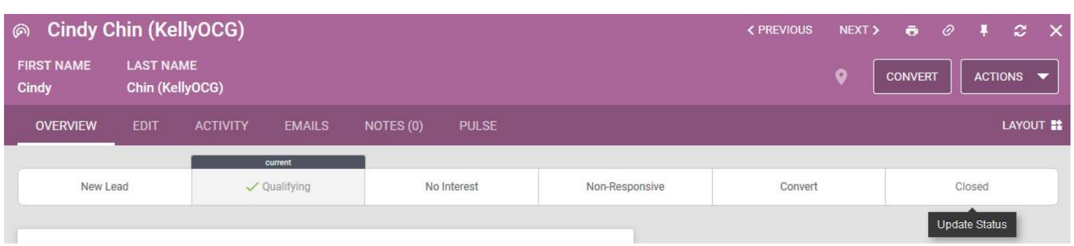
If there is no opportunity and you need to close out the lead, just hit the closed tab:



And hit the Update button.

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