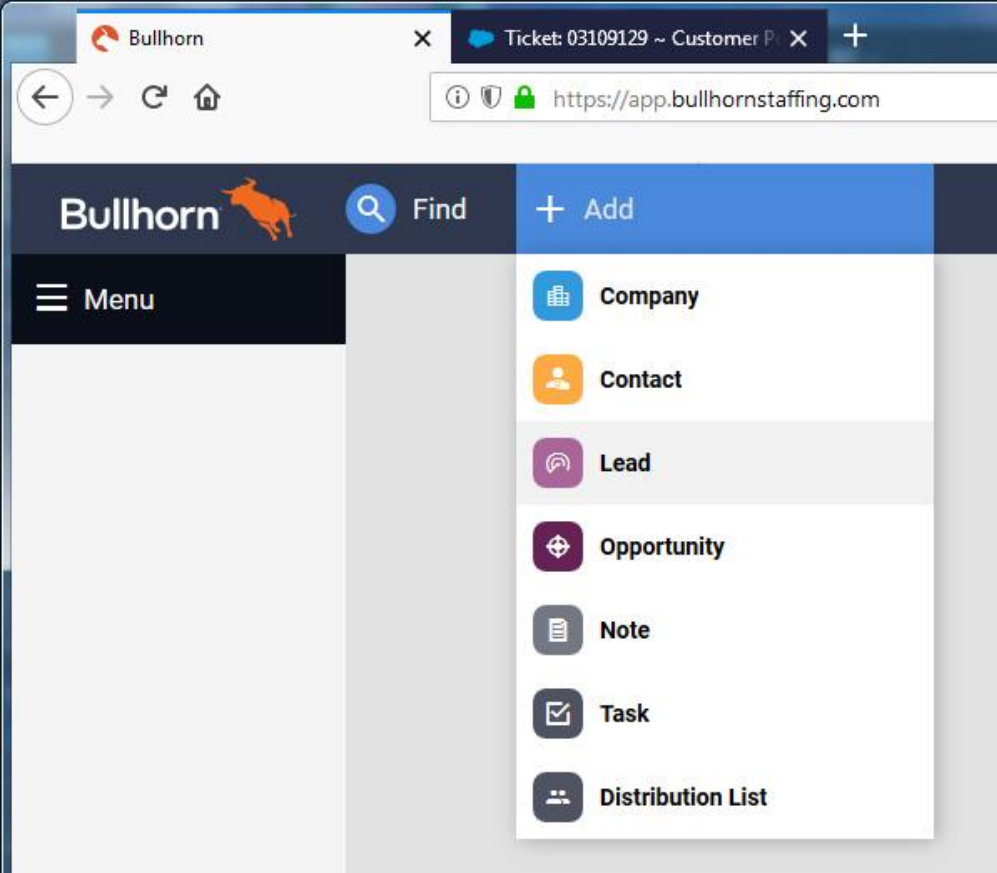


Question	Answer
<p>What is a Lead?</p>	<ul style="list-style-type: none"> • A Lead is a prospect that has not yet been qualified (e.g., a person or company for which you have little information and may be interested in PERSOLKELLY’s services). • Leads come from a variety of sources including: Personal/ 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
<p>How do I start to enter a new Lead?</p>	<ol style="list-style-type: none"> 1. You can create a new lead by clicking on the +Add field and then clicking the lead field  <p>The screenshot shows a web browser window with the URL https://app.bullhornstaffing.com. The application header includes the Bullhorn logo, a search bar with the text 'Find', and a '+ Add' button. A dropdown menu is open from the '+ Add' button, listing several options: Company, Contact, Lead (highlighted in grey), Opportunity, Note, Task, and Distribution List. A 'Menu' button is visible on the left side of the application interface.</p>

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

Add Lead

LEAD SOURCE

FIRST NAME This is their known by name

LAST NAME This is their family name

JOB TITLE This is the contact's job title

EXISTING COMPANY

NEW COMPANY

MQL RANK

COMMENTS

Contact Information

ADDRESS Address Apt
City Region Postcode
United States

PHONE
Format to have International Dialing Prefix code, followed by the phone number (eg. +61 2 XXXX XXXX for a Sydney number)

EMAIL

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

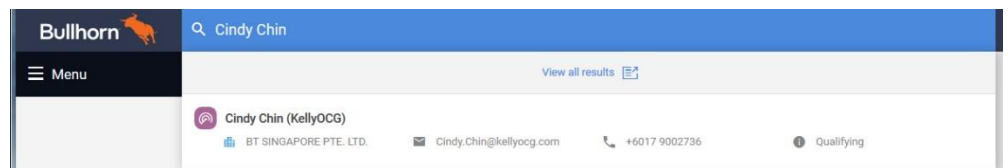
Once you have entered in the information that you know – click the blue save button:

The screenshot shows the Bullhorn 'Add Lead' form. The top navigation bar includes the Bullhorn logo, a search bar with 'Find', and user information 'Garry Pope'. The left sidebar has a 'Menu' icon and 'Add Lead' text. The main form area is titled 'COMMENTS' and contains two sections: 'Contact Information' and 'Lead Details'. The 'Contact Information' section has fields for ADDRESS (11 Aston Way, Apt, City: South West, 425698, Singapore), PHONE, and EMAIL. The 'Lead Details' section has fields for ASSIGNED TO, STATUS (New Lead), INDUSTRY (Arts and Recreati...), COUNTRY ASSIGNED (New Zealand, Australia, India), and PRODUCT (Temp, Perm). A blue 'SAVE' button is visible at the bottom right.

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

The screenshot shows the Bullhorn 'Leads' list view. The table has columns for Id, Name, First Name, Last Name, Job Title, and New Con. The table is filtered by 'Cindy Chin (KellyOCG)'. The table contains the following data:

Id	Name	First Name	Last Name	Job Title	New Con
5095					
5038	Cari French (KellyOCG)	Cari	French (KellyOCG)	Program Consultant - Kelly OCG - Global Managed Solutions	New Horiz nc.
5036	Cindy Chin (KellyOCG)	Cindy	Chin (KellyOCG)	Director, Global Solutions - APAC KellyOCG	
216625	Magda Dorego (KellyOCG)	Magda	Dorego (KellyOCG)		Tuv Süd
5509	Magda Dorego (Kelly OCG)	Magda	Dorego (Kelly OCG)	EMEA and APAC Pricing	Campari
6346	Magda Dorego (Kelly OCG)	Magda	Dorego (Kelly OCG)	EMEA and APAC Pricing	Deloitte - C
5932	Magda Dorego (KellyOCG)	Magda	Dorego (KellyOCG)	EMEA and APAC Pricing	McAfee AP
4846	Reinout Brons (KellyOCG)	Reinout	Brons (KellyOCG)	Director, Global Solution Architect - Global Solution Design	
5152	Sue Yin Lee	Sue Yin	Lee	APAC Resourcing & Talent Acquisition Specialist	BSI Service

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**:

The screenshot shows the 'Lead Details' form with the following fields and values:

- ASSIGNED TO:** Yasikaan Chairoo..., Elvin Tan, Gary Luk. Below the field is a note: 'Add a Note and send alert to each person you assign this Lead to (this does not happen automatically)'. A 'CLEAR ALL' button is visible.
- STATUS:** New Lead (with a green checkmark).
- INDUSTRY:** Agriculture Forest... A 'CLEAR ALL' button is visible.
- COUNTRY ASSIGNED:** Thailand, Singapore, Hong Kong. A note says 'To enable to track cross-country'. A 'CLEAR ALL' button is visible.
- PRODUCT:** Perm. A 'CLEAR ALL' button is visible.

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:

The screenshot shows a CRM record for 'Cindy Chin (KellyOCG)'. The record is currently in the 'Qualifying' status. The 'Recent Notes' section is empty, displaying a message: 'You do not have any notes on this record yet.' Below the message is an 'ADD NOTE +' button.

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

ABOUT

✓ Cindy Chin (KellyO...)

CLEAR ALL X

ACTION

✓ Sales Visit

COPY NOTE

No Yes

Replace the Comments with this note?

ADDITIONAL REFERENCES

SCHEDULE NEXT ACTION

None Appointment Task

Email Notification

INTERNAL USER

• Gary Luk • Wen Sze Ho yas

Yasikaan Chairongrojsakul

✉ Yasikaan_C@kellyservic... 📍 Singapore, Singapore

When do I convert a Lead into an Opportunity?

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.

Bullhorn

John Petrucci

View all results

Menu

Add Lead

Lead List

Find Results

John Petrucci

John Petrucci

Good Sounds karmi.mehdi@per... +819068604368

Musician

Good Sounds John Petrucci Utah

Opportunity Test

Good Sounds John Petrucci Actively Recruiting

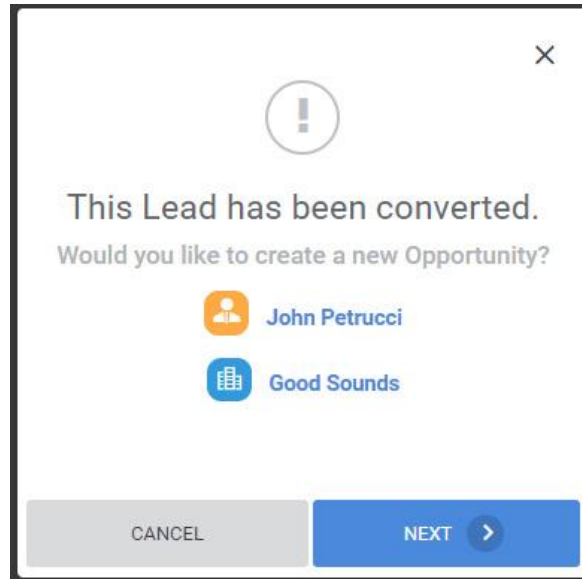
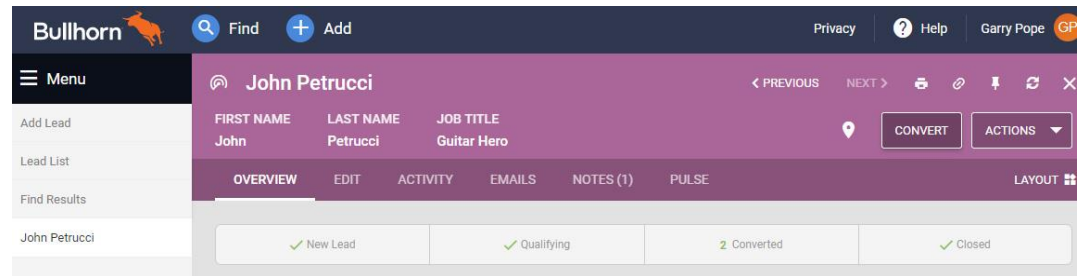
Mehdi Karmi - Musician

Good Sounds John Petruc... Mehdi Karmi 16 October ...

John Petrucci

Good Sounds karmi.mehd... +81906860... Casablanca...

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



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

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



And hit the Update button.