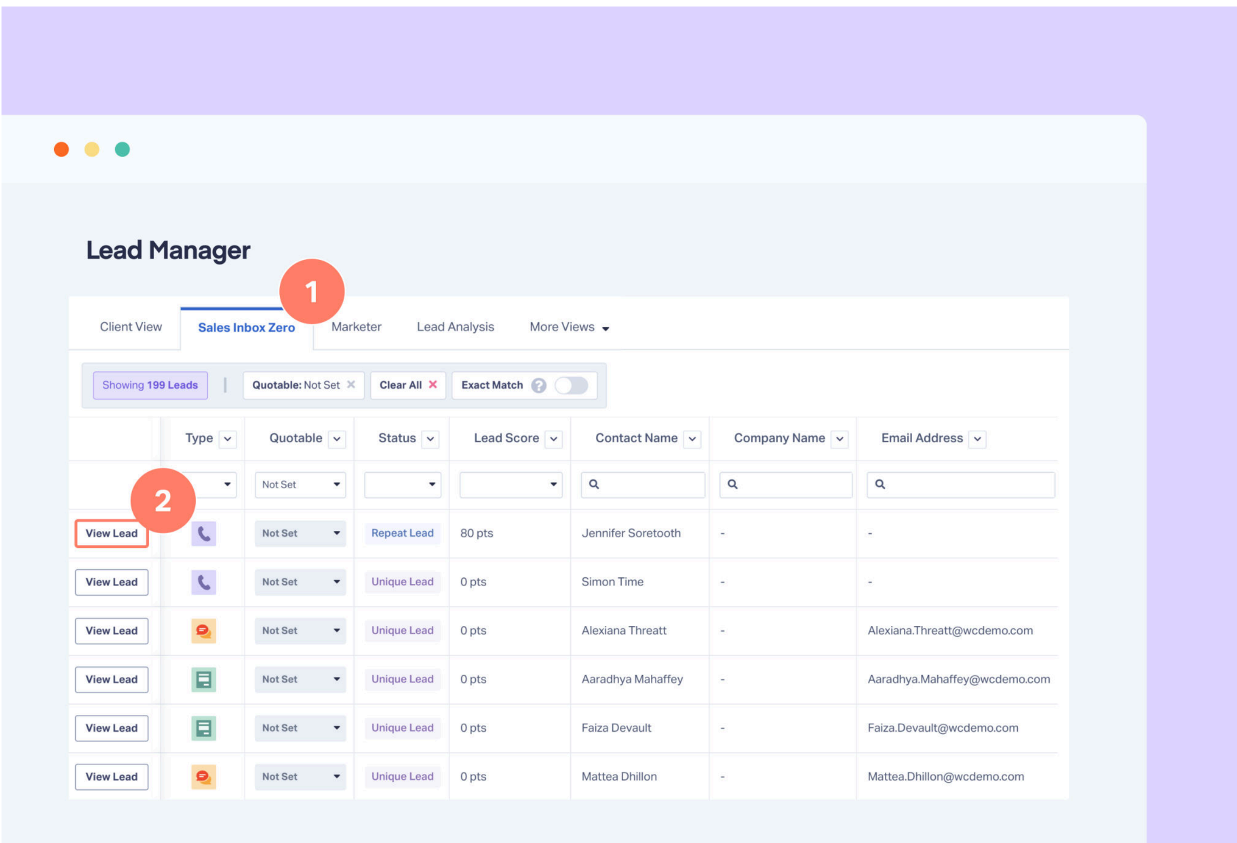
WHATCONVERTS

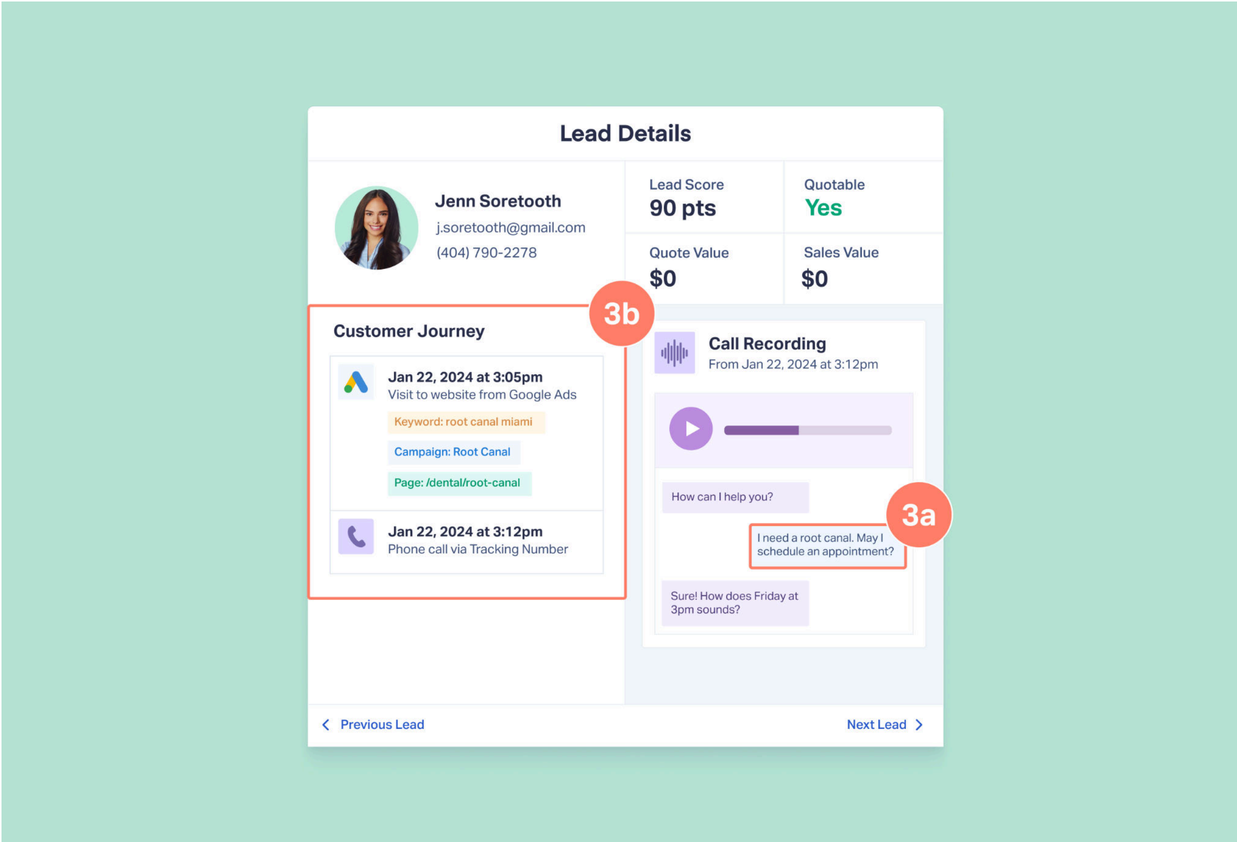
HOW-TO GUIDE

Qualify, Categorize, & Value Leads

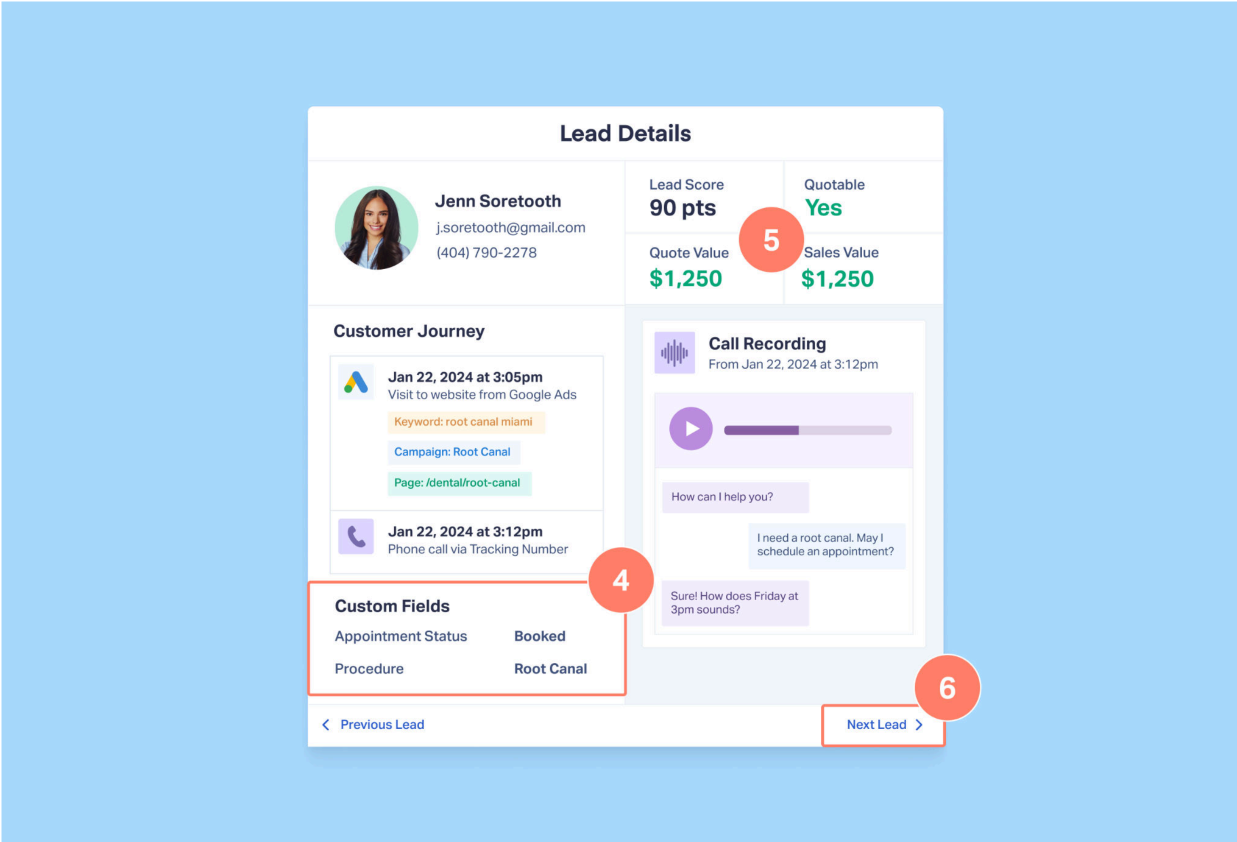
1 Follow a Daily Qualification Process – Dentist’s Office Example



1. Switch to the **Sales Inbox Zero** view to show all not yet qualified leads
2. Open the **Lead Details Page** on your first lead



3. Use **Customer Journey** and **engagement data** to determine if the lead is qualified
   a. Are they interested in an offered service? **Yes**
   b. Did they come from a PPC campaign? **Yes**



4. Fill out your **Custom Fields** to categorize leads (e.g., Procedure: Root Canal)
5. Add a **Quote Value** based on the **Procedure** (e.g., Root Canal is a $1,250 job on average)
6. Move on to the next lead and repeat the process until you reach inbox zero