

# Welcome to LeadMAX!

## Agent Training Guide



### Introduction

Use this guide to learn about how to access **LeadMAX®** and place lead orders.

LeadMAX is the **LMS** (Lead Management System) available exclusively through **AgentXcelerator®**.

LeadMAX offers Direct Mail for Annuity, Dental, Final Expense, Medicare Supplement, Medicare Advantage and Ancillary Products.

As an agent/agency you will have three order options:

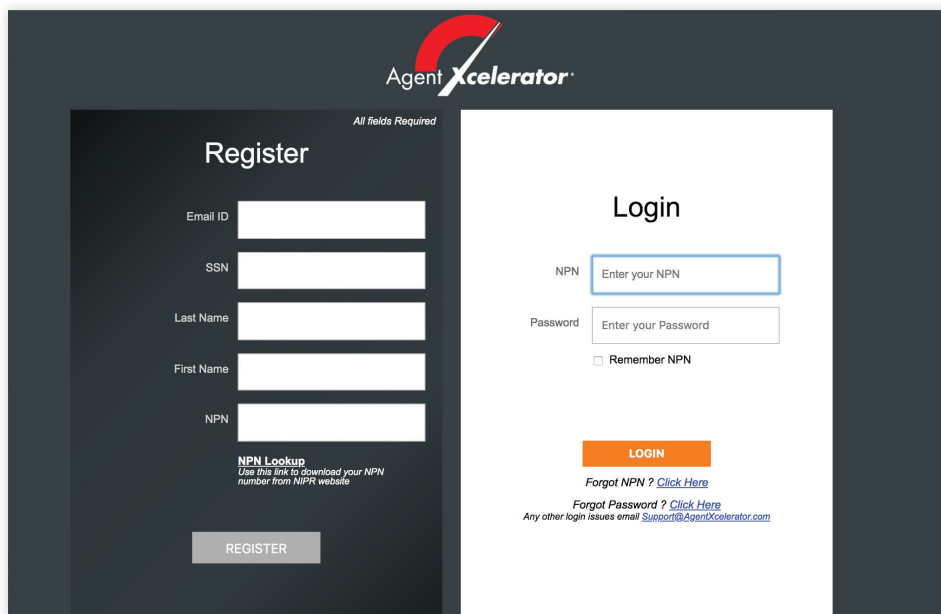
- 1. Order Direct Mail
- 2. Order Pay Per Lead Direct Mail
- 3. Order Large or Recurring Leads (150 leads or more over 10 weeks or more)

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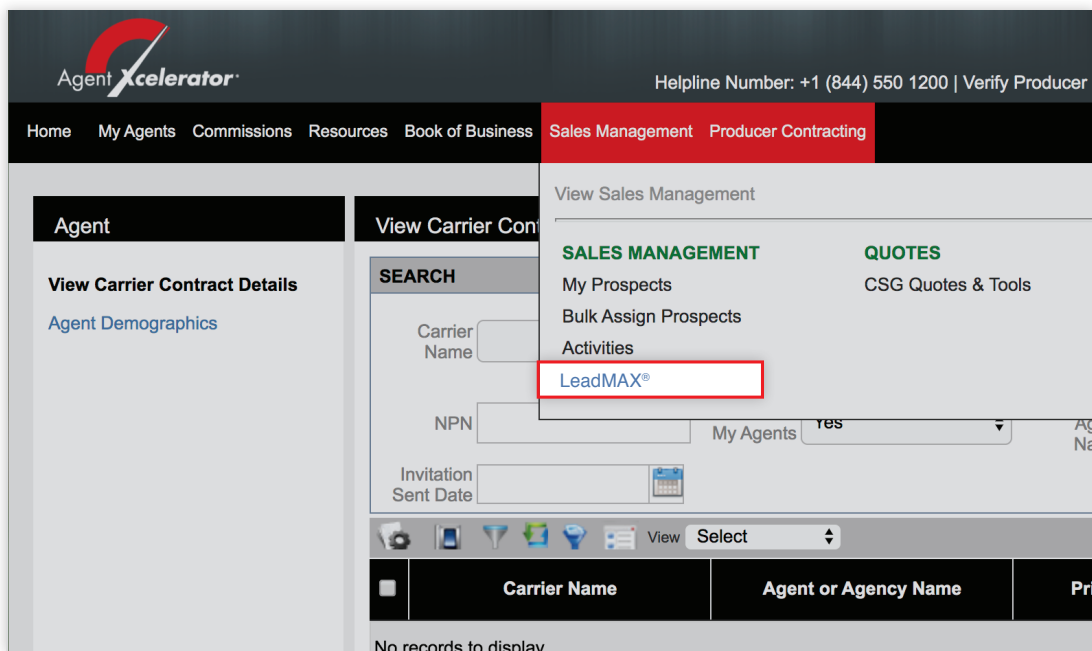
Access LeadMAX by logging into your AgentXcelerator account.

1. Go to <https://agency.agentxcelerator.com>
2. Login using your NPN and Password



The image shows the AgentXcelerator login and registration interface. On the left is the 'Register' form with fields for Email ID, SSN, Last Name, First Name, and NPN. Below these fields is an 'NPN Lookup' link and a 'REGISTER' button. On the right is the 'Login' form with fields for NPN and Password, a 'Remember NPN' checkbox, and a 'LOGIN' button. Below the login button are links for 'Forgot NPN?', 'Forgot Password?', and a support email address.

3. Hover over 'Sales Management' in the menu bar
4. Click on 'LeadMAX®'



The image shows the AgentXcelerator dashboard with the 'Sales Management' menu open. The menu bar includes 'Home', 'My Agents', 'Commissions', 'Resources', 'Book of Business', 'Sales Management', and 'Producer Contracting'. The 'Sales Management' dropdown menu is highlighted in red and contains the following options: 'View Sales Management', 'SALES MANAGEMENT', 'QUOTES', 'My Prospects', 'Bulk Assign Prospects', 'Activities', and 'LeadMAX®'. The 'LeadMAX®' option is highlighted with a red box. Below the menu, there is a search form with fields for 'Carrier Name', 'NPN', and 'Invitation Sent Date', and a 'View' dropdown menu. At the bottom, there is a table header with columns 'Carrier Name', 'Agent or Agency Name', and 'Pri'.

After login in, you will arrive at the LeadMAX Dashboard, which is laid out into different widgets:

## Activity

Displays quantity of new leads, follow-ups, and activities

## Order

Place orders for mailings, Leads, and Large or Recurring Leads.

## Totals

Total leads and clients

## Lead

View leads by type and source: New leads, Viewed Leads, and Leads with a Worked Status

## Map-New Leads

Display of new leads that have not been previously viewed

## Calendar

View of upcoming appointments and callbacks

## Search Client

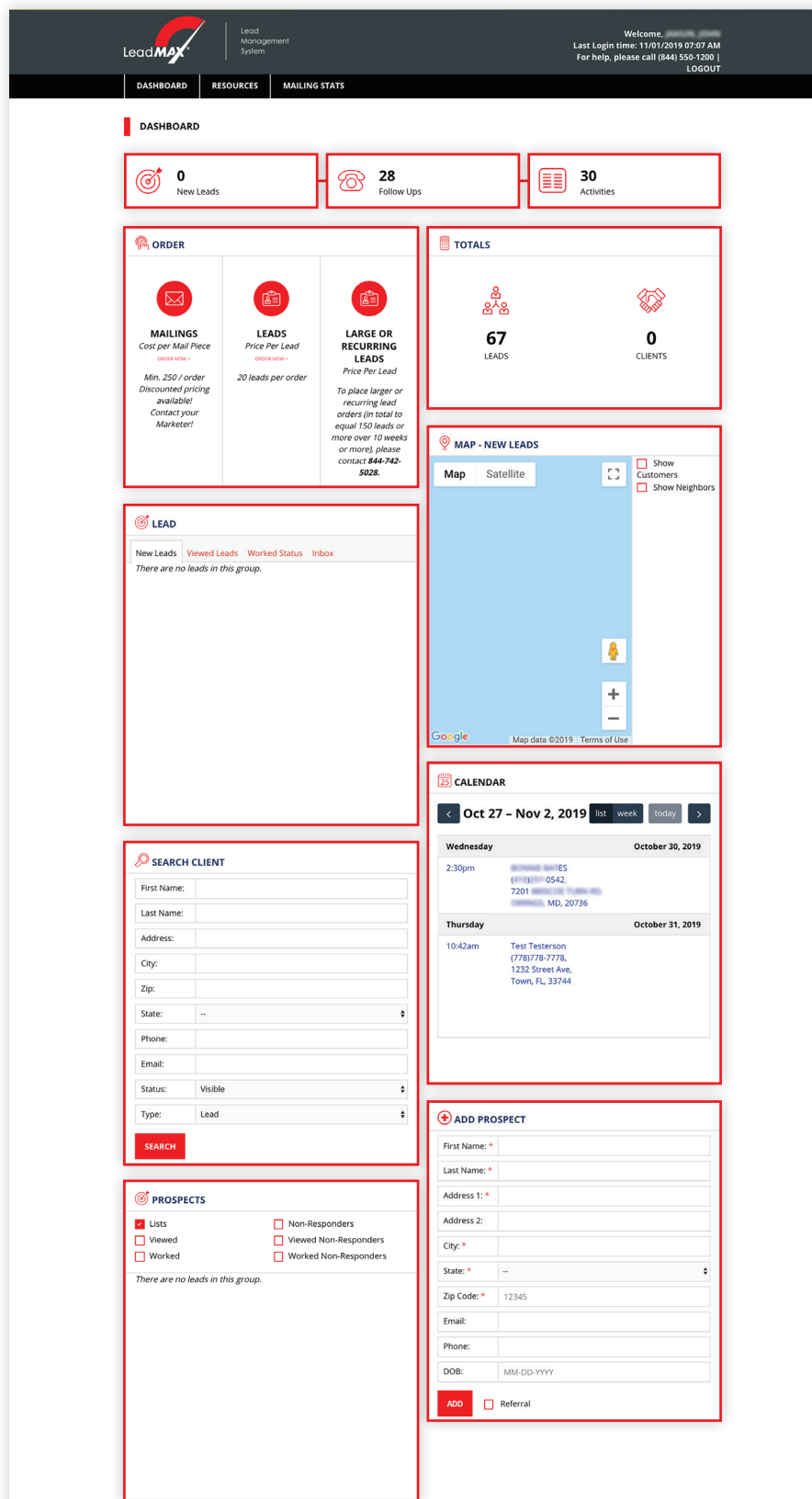
Use to search for leads by name, address, type, city, state, zip, phone, and email.

## Prospects

View non-responder information from mailing campaigns

## Add Prospect

Use to add new prospects information for future follow up and disposition



The screenshot displays the LeadMAX Dashboard interface. At the top, there is a navigation bar with the LeadMAX logo, 'Lead Management System', and a welcome message with login details. Below the navigation bar, the dashboard is divided into several sections:

- DASHBOARD**: A summary section with three cards showing '0 New Leads', '28 Follow Ups', and '30 Activities'.
- ORDER**: A section for placing orders, including 'MAILINGS', 'LEADS', and 'LARGE OR RECURRING LEADS'.
- TOTALS**: A section showing '67 LEADS' and '0 CLIENTS'.
- MAP - NEW LEADS**: A map view showing new leads with options to 'Show Customers' and 'Show Neighbors'.
- CALENDAR**: A calendar view showing appointments for 'October 27 - Nov 2, 2019'.
- SEARCH CLIENT**: A form for searching clients by name, address, city, state, zip, phone, and email.
- PROSPECTS**: A section for viewing prospects, including a 'SEARCH' button and a list of prospects.
- ADD PROSPECT**: A form for adding new prospects, including fields for name, address, city, state, zip, phone, email, and date of birth.

Orders can be placed as **Mailings**, Leads, and Large or Recurring Leads.

To place an order click on the icon for the type of order you are placing.

## Mailings

Minimum order 250

1. Select Mailings
2. Complete the form by using the drop down menus to select 'Mail Type', 'State', 'Income Range' and 'Age Range'
3. Click 'Next'
4. Select an area

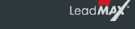
**Map** - Click your desired county or counties for your order.

**County/Zip Code/SCF list** - Click on a tab and click on an area in the list. If you want leads from more than one area, hold the 'ctrl' key on your keyboard down and click areas.

5. Choose a mailing piece by clicking 'Select'
6. Click on 'Get Counts'

## Large or Recurring Leads

To place larger or recurring lead orders (150 leads or more over 10 weeks or more), please contact 844-742-5028.




Lead Management System


Welcome, **ADMIN**  
Last login time: 11/01/2019 07:07 AM  
For help, please call (844)550-5100  
[LOGOUT](#)

[DASHBOARD](#)
[RESOURCES](#)
[MAILING STATS](#)


### DASHBOARD




**0**  
New Leads




**28**  
Follow Ups




**30**  
Activities




**ORDER**



**MAILINGS**  
Cost per Mail Piece  
[ORDER NOW >](#)




**LEADS**  
Price per Lead  
[ORDER NOW >](#)




**LARGE OR RECURRING LEADS**  
[ORDER NOW >](#)


**TOTALS**



**67**  
LEADS



**0**  
CLIENTS

 ORDER

## MAILINGS

Select Mail Type

Select a State

Income Range:

Min

Max

Age Range:

Min

Max

NEXT

CANCEL

**MedSupp (Med Supp : Texas) 20 Leads Per Order**

Select counties to be included in your counts by clicking on the map or selecting the appropriate tab below. Then click Get Counts to see counts and select the areas you wish to order.

Select by Counties

Select County

- (TX125) Dikens
- (TX127) Dimmitt
- (TX129) Donley
- (TX131) Duval
- (TX133) Ector
- (TX135) Elbert
- (TX137) Edwards
- (TX139) Ellis
- (TX141) El Paso
- (TX143) Erath
- (TX145) Falls
- (TX147) Fannin

Hold down CTRL to select multiple counties or deselect a county



Orders can be placed as Mailings, **Leads**, and Large or Recurring Leads.

To place an order click on the icon for the type of order you are placing.

## Leads

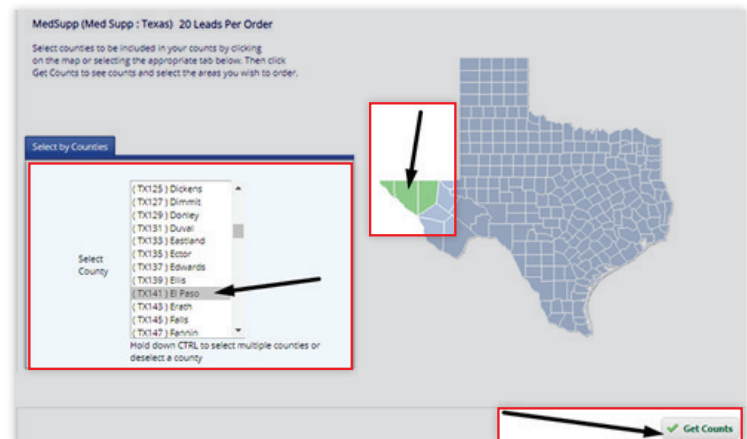
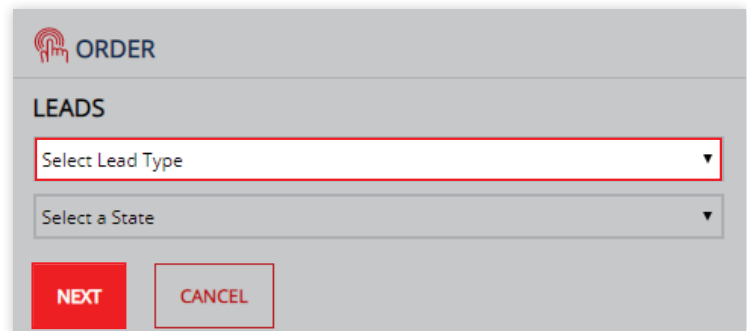
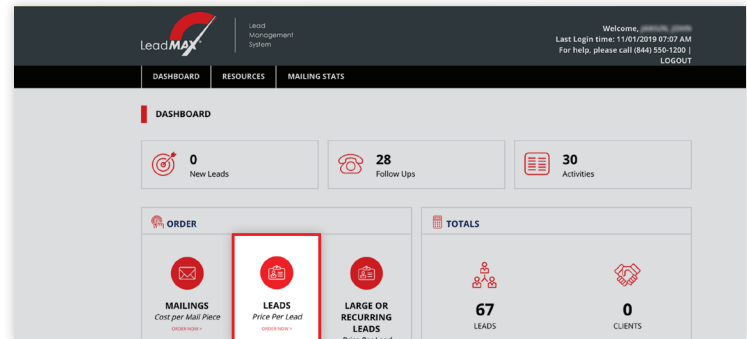
20 leads per order.

1. Select Leads
2. Complete the form by using the drop down menus to select 'Lead Type' and 'State'
3. Click 'Next'
4. Select an area

**Map** - Click your desired county or counties for your order.

**County list** - Click on a county. if you want leads from more than one county, hold the 'ctrl' key on your keyboard down and click on additional counties.

5. Click on 'Get Counts'



## Note:

*Reponders sometimes take 2-3 weeks to become NEW Leads. Response rates may be lower during AEP.*



## Finalizing an order

After clicking 'Get Counts' your order will be ready to be completed.

1. Enter a quantity in the box next to 'Enter Desired Quantity' or enter individual desired quantities in each of the areas you selected.

2. Click 'Finalize'

3. If you have an Access Code for a marketing allowance, enter the code.

If the allowance changes the total to \$0.00, click on 'SUBMIT ORDER'

4. If you have a balance due, enter payment information and click on 'SUBMIT ORDER'

By Zip By SCF By County By County and SCF

Export to CSV

Enter Desired Quantity  Select All

State	County	Available	Price (\$/M)	Order	Total
GA	Brantley	600	\$ 425.00	<input type="text" value="54"/>	\$ 22.95
GA	Camden	2475	\$ 425.00	<input type="text" value="220"/>	\$ 93.50
GA	Charlton	364	\$ 425.00	<input type="text" value="34"/>	\$ 14.45
GA	Glynn	5552	\$ 425.00	<input type="text" value="492"/>	\$ 209.10
Totals		9011		<input type="text" value="800"/>	\$ 340.00

Any order size below 500 will be shipped as standard, and above 500 will be shipped as first class.

Order Information

Item Title	Description	Quantity	Price
Mail Order	Med Supp General	800	\$ 340.00

Geography

State: GA

Order Type: county

Income: 0.00 - 999999.00

Demographics

Age: 65 - 79

Provide Phone Numbers: ☒

Subtotal: \$ 340.00

Marketing Allowance (13020635): \$ - 250.00

Total: \$ 90.00

Access Code:

This order will ship as first class.

Payment

Payment Type:

Card Number:

Expiration Date:

Security Code:

Billing Address

First Name:

Last Name:

Address:

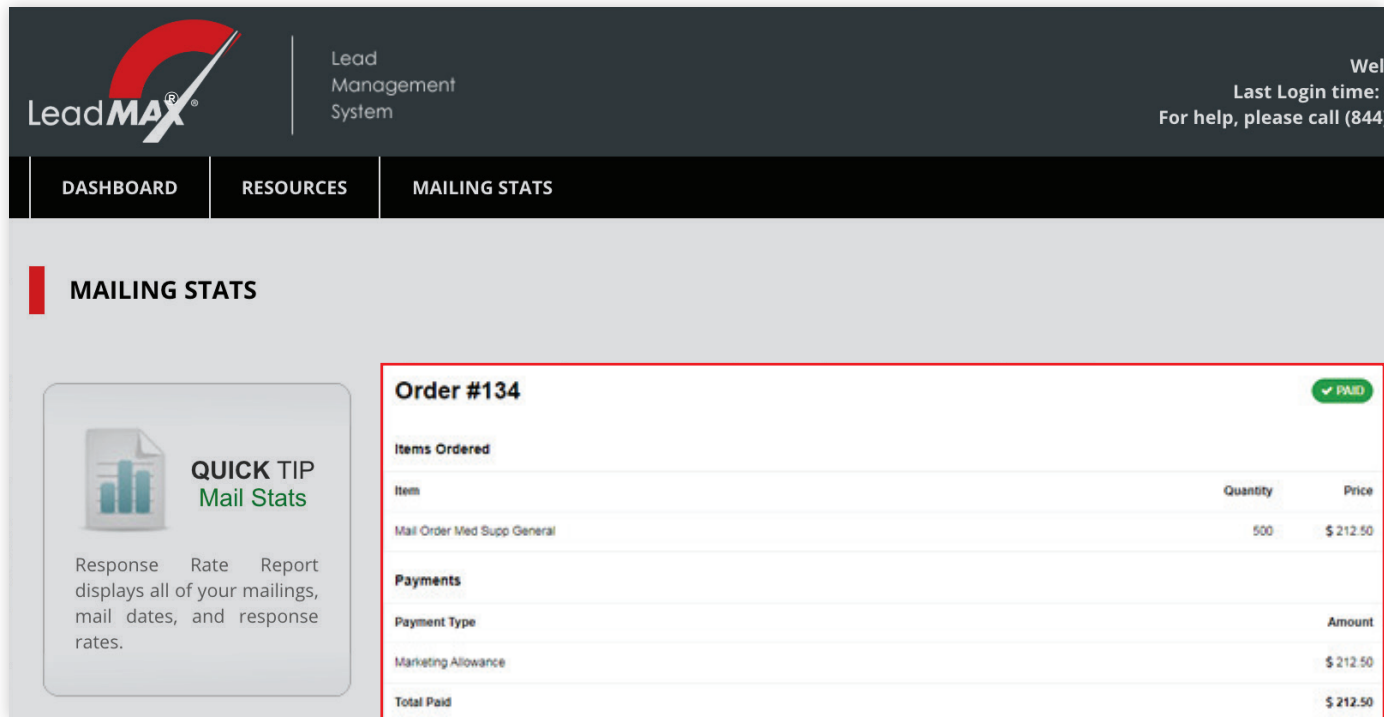
City:

State:

Zip:

## Order Completion

When the order is finished, an invoice of the order will display.



**LeadMAX** | Lead Management System

Wel Last Login time: For help, please call (844

**DASHBOARD RESOURCES MAILING STATS**

**MAILING STATS**

**QUICK TIP Mail Stats**

Response Rate Report displays all of your mailings, mail dates, and response rates.

**Order #134** PAID

**Items Ordered**

Item	Quantity	Price
Mail Order Med Supp General	500	\$ 212.50

**Payments**

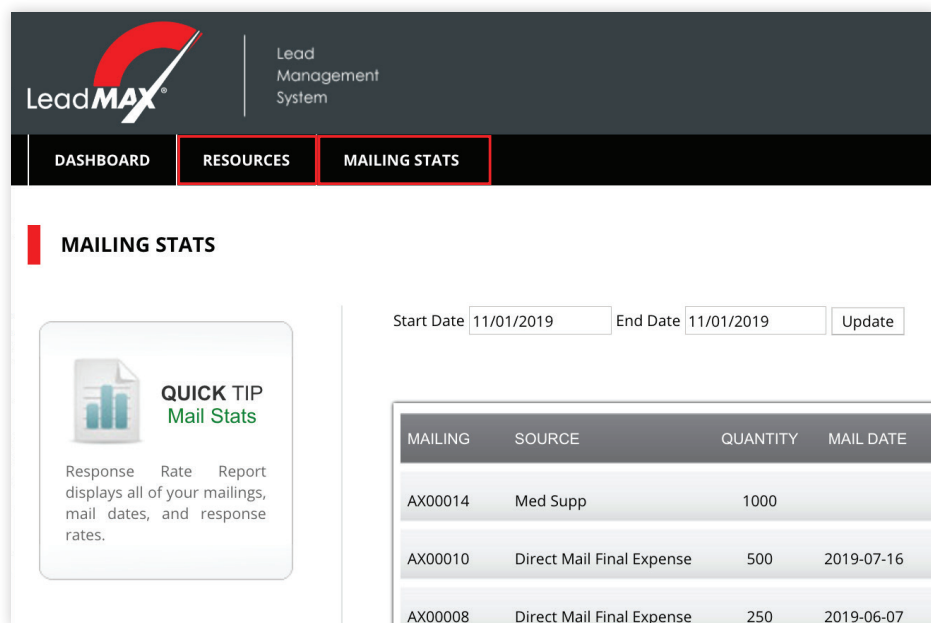
Payment Type	Amount
Marketing Allowance	\$ 212.50
<b>Total Paid</b>	<b>\$ 212.50</b>

## Resources

Additional marketing material available under 'Resources' tab.

## Mailing Stats

View a response rate report of all of your mailings, mail dates and responses by clicking on 'Mailing Stats' tab.



**LeadMAX** | Lead Management System

**DASHBOARD RESOURCES MAILING STATS**

**MAILING STATS**

Start Date  End Date

**QUICK TIP Mail Stats**

Response Rate Report displays all of your mailings, mail dates, and response rates.

MAILING	SOURCE	QUANTITY	MAIL DATE
AX00014	Med Supp	1000	
AX00010	Direct Mail Final Expense	500	2019-07-16
AX00008	Direct Mail Final Expense	250	2019-06-07

## View & Follow Up

You can view and follow up on your leads using the quick view links at the top of the dashboard, using the Map, New Leads and the Lead widget.

## Quick View Links

Click to open a map with a list leads

## New Leads

Leads that have been assigned an active disposition (Callback, Appointment Set, App Submitted). These leads also appear under Worked Status in the Lead widget.

Leads that do not have a disposition. These leads will typically also appear under New Leads, Printed Leads.

The screenshot displays the LeadMAX dashboard interface. At the top, the LeadMAX logo is on the left, and the user's login information is on the right: "Welcome, [username]", "Last Login time: 11/01/2019 07:07 AM", "For help, please call (844) 550-1200 | LOGOUT". Below the header is a navigation bar with "DASHBOARD", "RESOURCES", and "MAILING STATS". The main content area is titled "DASHBOARD" and features several widgets. A top row of three white boxes with red borders shows "0 New Leads" (with a target icon), "28 Follow Ups" (with a phone icon), and "30 Activities" (with a calendar icon). Below this, the "ORDER" section contains three columns: "MAILINGS" (Cost per Mail Piece, ORDER NOW >), "LEADS" (Price Per Lead, ORDER NOW >), and "LARGE OR RECURRING LEADS" (Price Per Lead). The "TOTALS" section shows "67 LEADS" (with a group of people icon) and "0 CLIENTS" (with a handshake icon). At the bottom right, the "MAP - NEW LEADS" section includes "Map" and "Satellite" buttons, a map view icon, and checkboxes for "Show Customers" and "Show Neighbors".

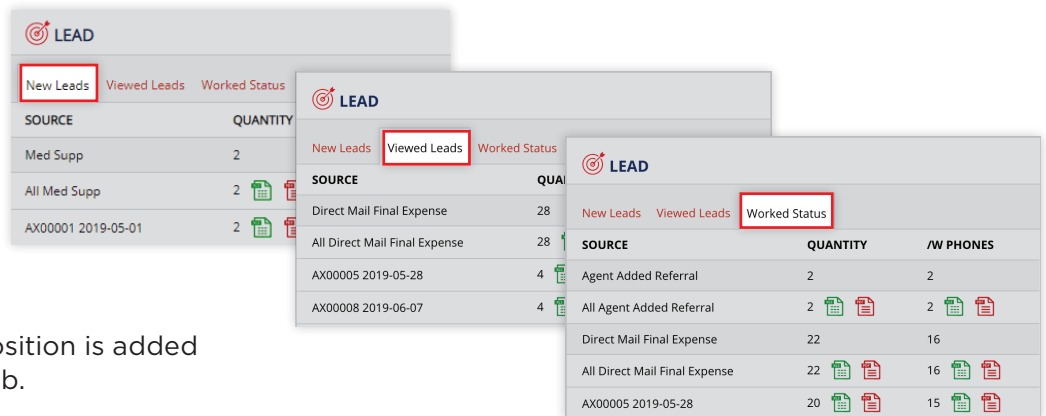






## Lead Widget

**New Leads** - Leads that have not been viewed.





**Viewed Leads** - When new leads are viewed the leads move to the viewed lead section.

**Worked Status** - After a disposition is added leads will display under this tab.



LEAD		
New Leads Viewed Leads Worked Status		
SOURCE	QUANTITY	
Med Supp	2	
All Med Supp	2	 
AX00001 2019-05-01	2	 

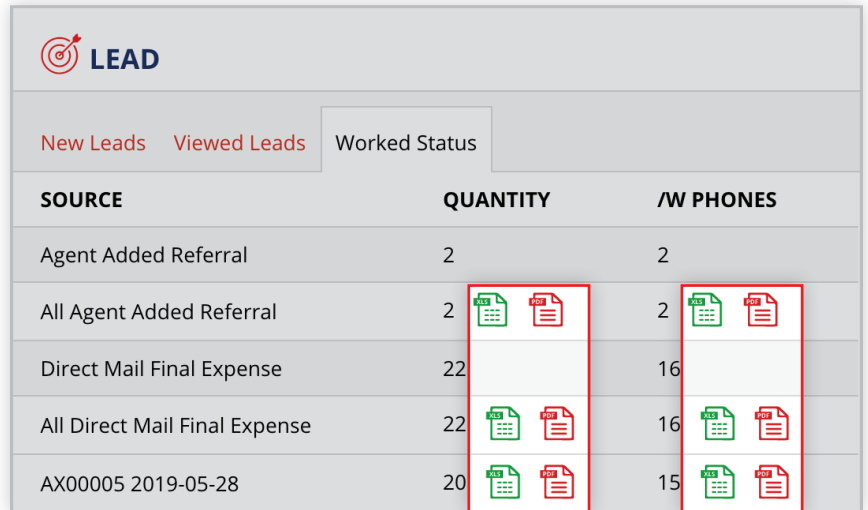
LEAD		
New Leads Viewed Leads Worked Status		
SOURCE	QUANTITY	
Direct Mail Final Expense	28	
All Direct Mail Final Expense	28	
AX00005 2019-05-28	4	 
AX00008 2019-06-07	4	 

LEAD		
New Leads Viewed Leads Worked Status		
SOURCE	QUANTITY	/W PHONES
Agent Added Referral	2	2
All Agent Added Referral	2	2
Direct Mail Final Expense	22	16
All Direct Mail Final Expense	22	16
AX00005 2019-05-28	20	15

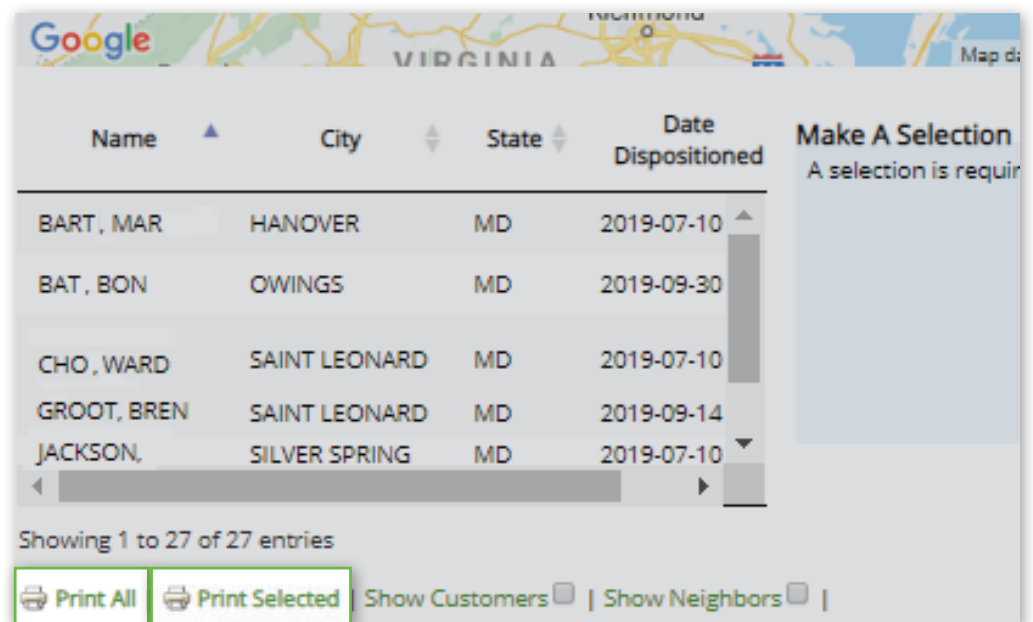
## Lead Sheets

In the Lead Widget, click on the **GREEN** icon to download an **Excel spreadsheet** and the **RED** icon for **PDF file**.





LEAD		
New Leads Viewed Leads Worked Status		
SOURCE	QUANTITY	/W PHONES
Agent Added Referral	2	2
All Agent Added Referral	2	2
Direct Mail Final Expense	22	16
All Direct Mail Final Expense	22	16
AX00005 2019-05-28	20	15

On the Leads map with list, click on **Print All** or select leads in the list and click **Print Selected**



Name	City	State	Date Dispositioned
BART, MAR	HANOVER	MD	2019-07-10
BAT, BON	OWINGS	MD	2019-09-30
CHO, WARD	SAINT LEONARD	MD	2019-07-10
GROOT, BREN	SAINT LEONARD	MD	2019-09-14
JACKSON,	SILVER SPRING	MD	2019-07-10

Showing 1 to 27 of 27 entries

 Print All  Print Selected Show Customers ☐ Show Neighbors ☐

## Anatomy of a Leadsheet

After clicking on the red icon to open a PDF file of your leads, the lead sheet will display.

Completed lead card



Lead information

Source: Direct Mail Final Expense

<b>Lead Information</b>	<b>Assigned: 2019-10-02</b>	<b>Received: 2019-10-02</b>
Lead Name: CHILE D. DOUGLAS		
Phone Number: (555)524-5446		Email:
Address: 762 ATTS AVE		
City: HANOV	State: MD	Zip: 21000
Gender: M	Date of Birth: 01-15-1955	Age: 64

Non-Responder Neighbors

TOYI ODUP 8000 PADD CT SEVER MD 24444	ELLE AYE 7505 ACK CT SEVER MD 24444
1963-06-15 KEITH MUELLE 7920 KEEPER DR SEVER MD 24444	1954-10-15 CELIA TOYI 1811 LADD CT SEVER MD 24444

Lead follow-up form

1956-09-15		1962-06-15	
<b>Contact Approach</b>	<b>Contact Information</b>	<b>Appointment Set</b>	<b>Follow Up / Next Steps</b>
phone	date time	date time	
e-mail			
visit			
<b>Marketing information provided</b>		<b>Appointment Notes</b>	
Pre-approach letter <input type="checkbox"/>		Needs uncovered	
Brochure <input type="checkbox"/>			
Personalized Flyer <input type="checkbox"/>		Carriers presented	
Prestige letter <input type="checkbox"/>			
Booklet <input type="checkbox"/>		Products presented	
Appointment confirmation letter <input type="checkbox"/>			

Agent #: 7729 (JOHN)

Order #: 1468

The federal rule allows a three (3) month consent to contact time limit following the date of the consumer inquiry.

ID Mailing: AX000

Lead #: 409014

## Dispositioning

To disposition a lead, first open a list of leads by clicking on a Quick View Link or Source link in the Lead Widget (see page 9).

Select a lead from the lead list

1. Complete the form using the Disposition drop down menu, Date/Time selector, Priority drop down menu, and comment field.
2. Click the Save button (a change in the comment history will verify the disposition saved.)

The screenshot shows a table of leads with columns: Name, City, State, Date Dispositioned, and Make. The selected lead is BAT, BON in OWINGS, MD, dated 2019-09-30. The detailed view shows the lead's name, phone number, and date. A dropdown menu for 'Disposition' is open, showing options: Appointment Set, Select Activity, Active, Appointment Set, App Submitted, Callback, Sold, Badlead, Bad Lead, Deceased, No Phone Number, Unsold, and Not Interested. The 'Save' button is highlighted in red.

Name	City	State	Date Dispositioned	Make
BART, MAR	HANOVER	MD	2019-07-10	A select
BAT, BON	OWINGS	MD	2019-09-30	

Med Supp  
(555) 555-2525  
Date Dispositioned: 2019-09-30

Disposition: Appointment Set  
Date/Time: Select Activity  
Priority: Active  
Comment: Appointment Set

Comment History  
[9/30/19 11:37 AM]  
[7/16/19 10:15 AM]

Showing 1 to 27 of 27 entries

Edit Reset Save

**Note:** *Dispositioned leads will move to 'Worked Status'*

3. If you saved the disposition as an Appointment or a callback a calendar entry will be created.

**Tip:** Clicking on the calendar header will open a larger version of the calendar

The screenshot shows a calendar interface with a header for 'Oct 13 - 19, 2019'. The calendar entry for Friday, October 18, 2019, at 11:45am, is highlighted. The entry details are: BON BAT, (410)257-0542, 7201 BRISTURN RD, OWINGS, MD, 20736.

CALENDAR

Oct 13 - 19, 2019

list week today


Friday October 18, 2019

11:45am BON BAT  
(410)257-0542,  
7201 BRISTURN RD,  
OWINGS, MD, 20736









## Prospects widget

After placing order, you can view Non-Responders from the mailing campaign that was purchased using the Prospects widget.

Just like the Lead widget, if you click on non-responders to view them, the non-responders will move to Viewed Non-Responders. If you disposition a non-responder it will move to Worked Non-Responders.

<div> <div>  <b>PROSPECTS</b> </div> </div>		
<input type="checkbox"/> Lists	<input checked="" type="checkbox"/> Non-Responders	
<input type="checkbox"/> Viewed	<input type="checkbox"/> Viewed Non-Responders	
<input type="checkbox"/> Worked	<input type="checkbox"/> Worked Non-Responders	

SOURCE	QUANTITY	/W PHONES
Med Supp - NR	1000	86
All Med Supp - NR	1000 	86 
AX00014	1000 	86 
Direct Mail - Final Expense - NR	480	91
All Direct Mail - Final Expense - NR	480 	91 
AX00010 2019-07-16	480 	91 

## Add Prospect

Prospects that you add will be available to be viewed in the Lead widget or by using Search Client

## Search Client

Find leads, prospects,  
and non-responders.

ADD PROSPECT

First Name: \*

Last Name: \*

Address 1: \*

Address 2:

City: \*

State: \* --

Zip Code: \* 12345

Email:

Phone:

DOB: MM-DD-YYYY

ADD

☐ Referral

SEARCH CLIENT

First Name:

Last Names:

Address:

City:

Zip:

State: -- ▼

Phone:

Email:

Status: Visible ▼

Type: Lead ▼

SEARCH