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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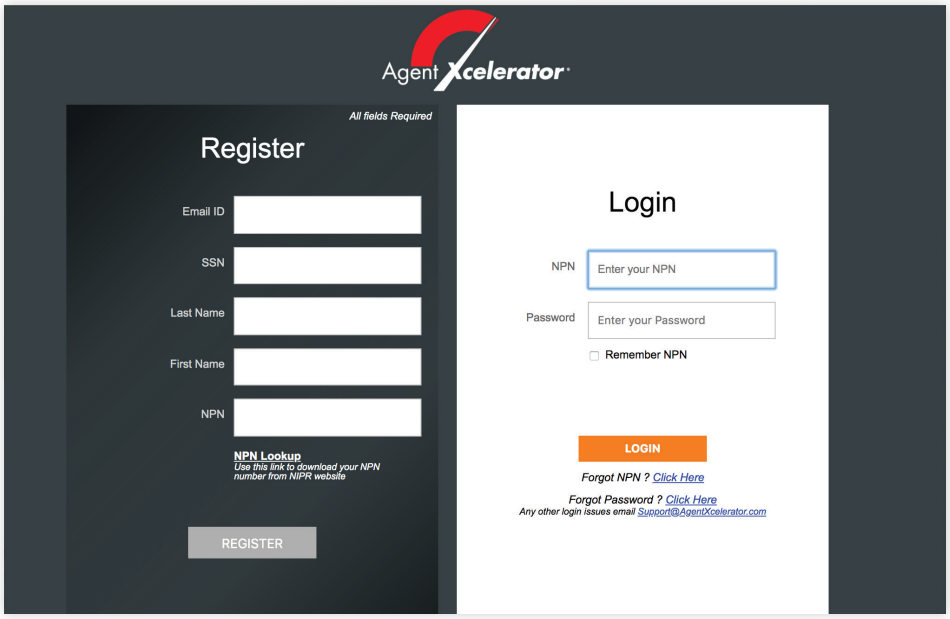
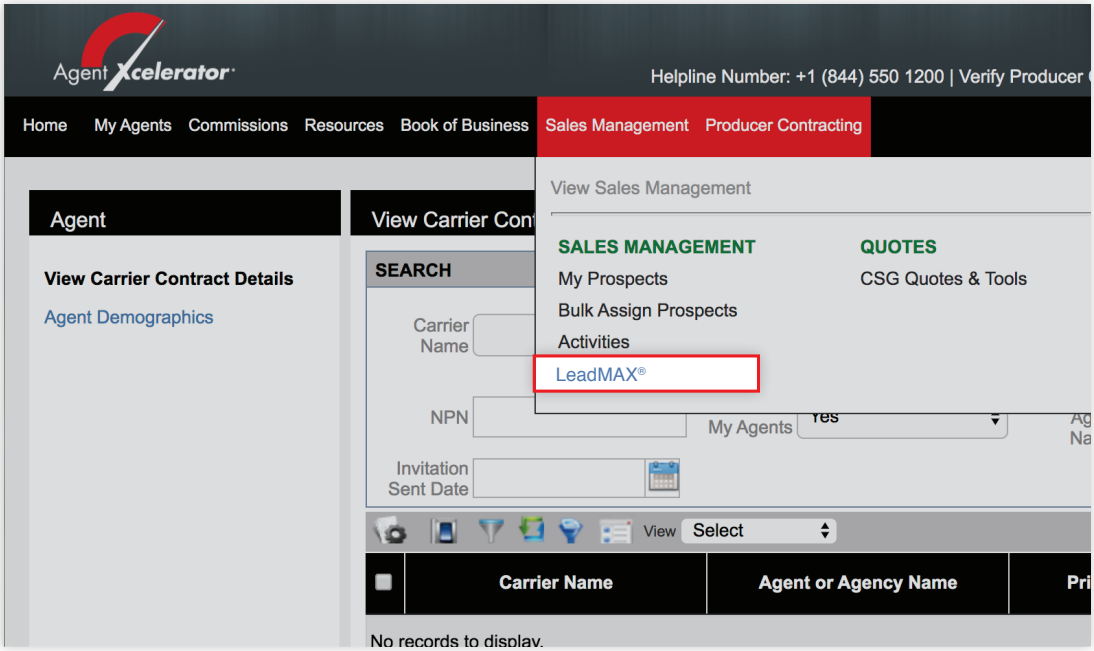
Accessing LeadMAX®

Access LeadMAX by logging into your AgentXcelerator account.

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



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



Dashboard Overview

After loggin 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

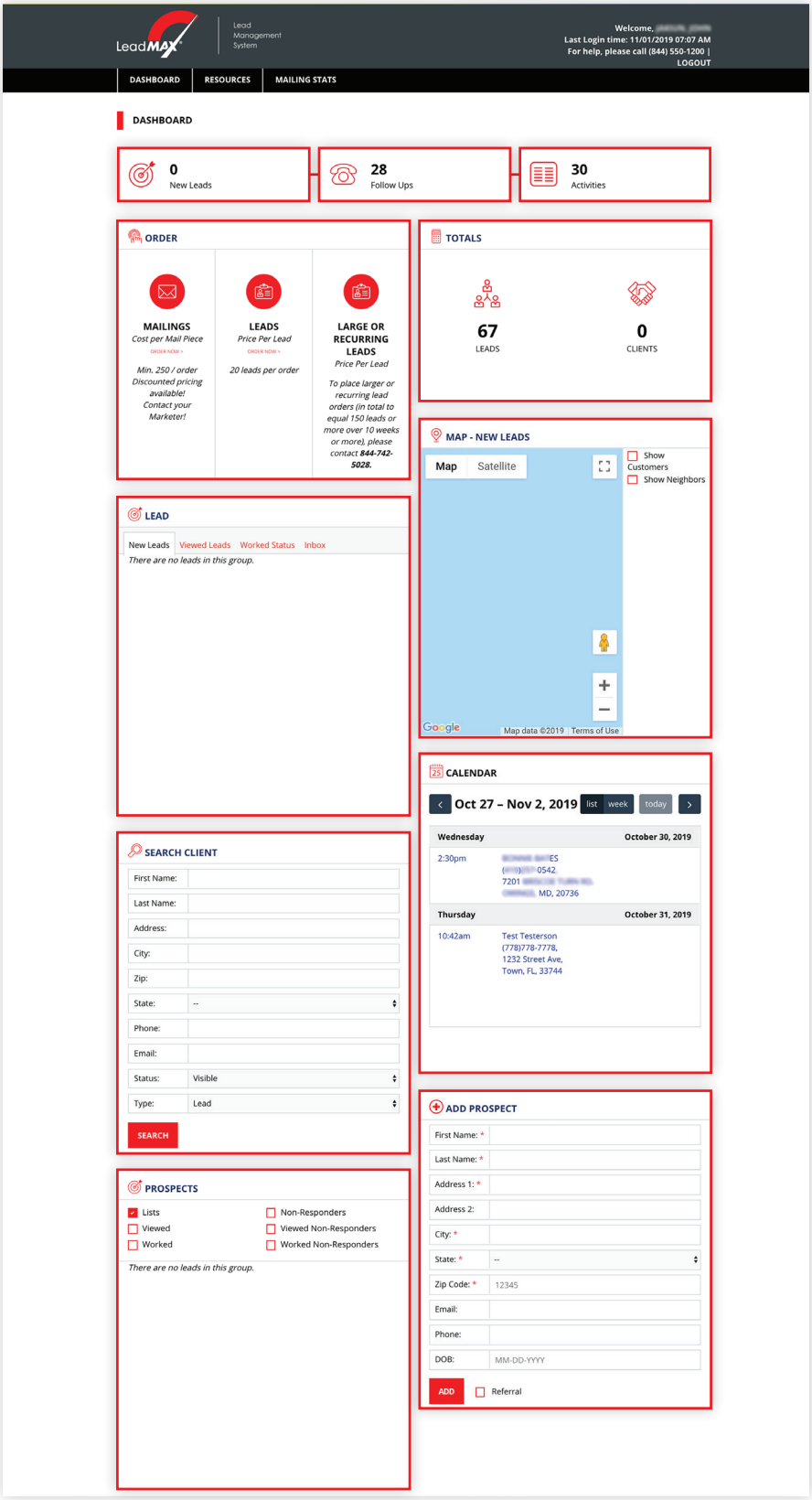
Map-New Leads
Display of new leads that have not been previously viewed

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

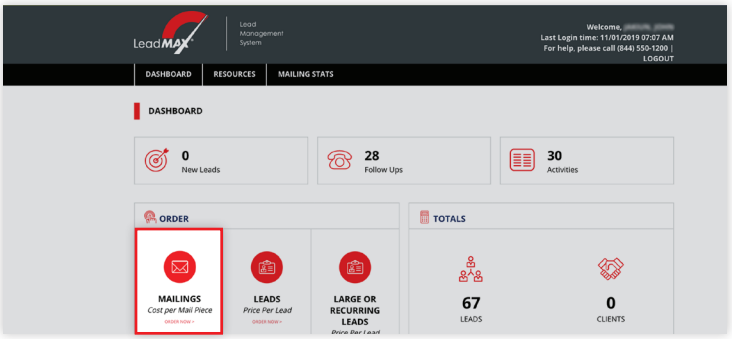
Add Prospect
Use to add new prospects information for future follow up and disposition



Placing a Mailings Order

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.



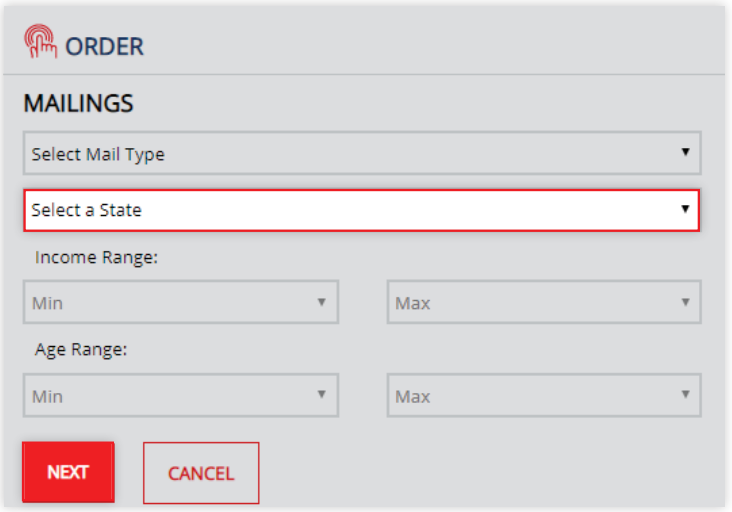
Mailings

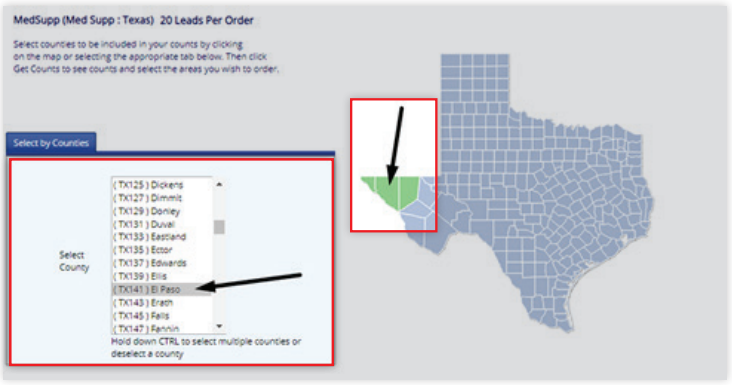
Minimum order 250

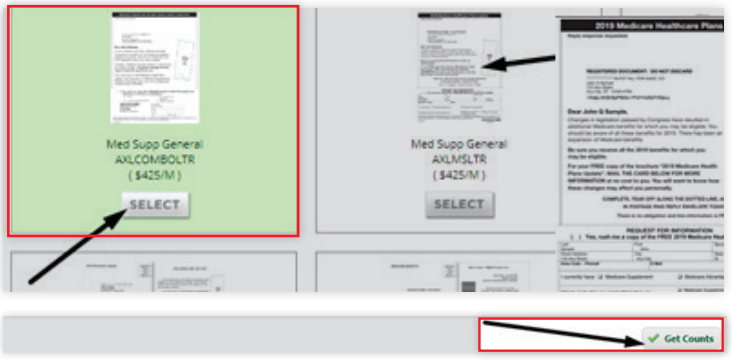
1. Select Mailings
2. Complete the form by using the drop down menus to select 'Mail Type', 'State', 'Income Range' and 'Age Range'
3. Click 'Next'
4. Select an area

   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'







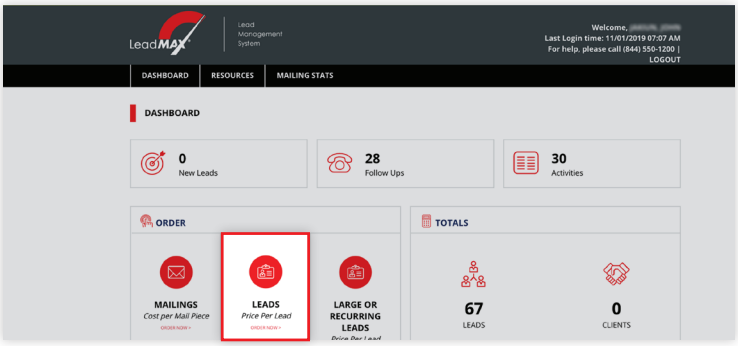
Large or Recurring Leads

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

Placing a Leads Order

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.



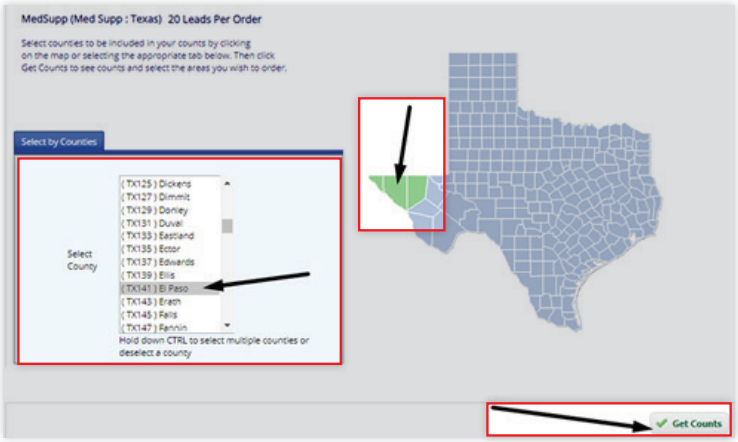
Leads

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’



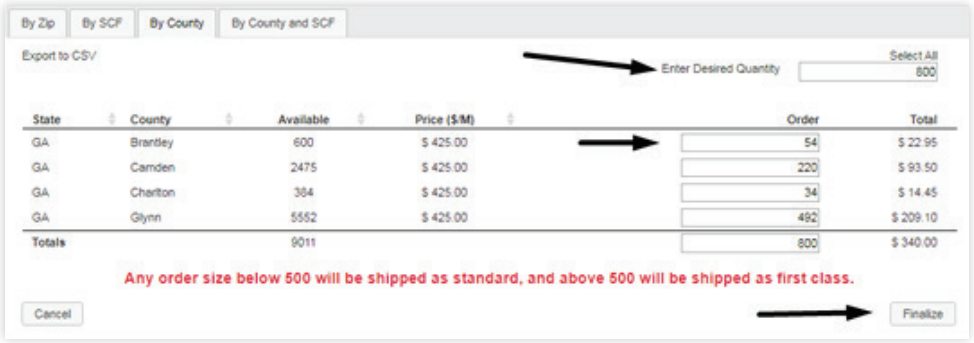
Note:
Reponders sometimes take 2-3 weeks to become NEW Leads. Response rates may be lower during AEP.

Finalizing an order

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

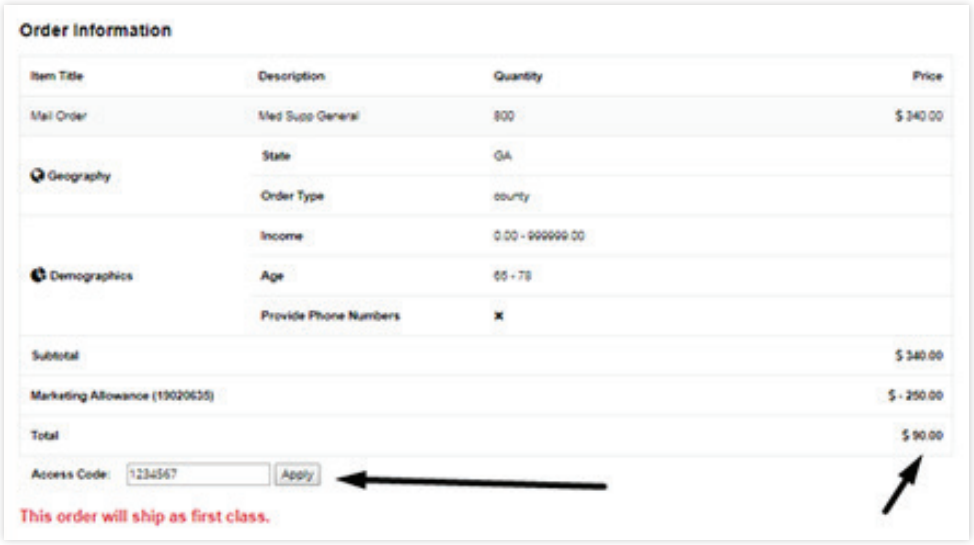
1. Enter a quantity in the box next to 'Enter Desired Quantity' or enter individual desired quantities in each of the areas you selected.

2. Click 'Finalize'

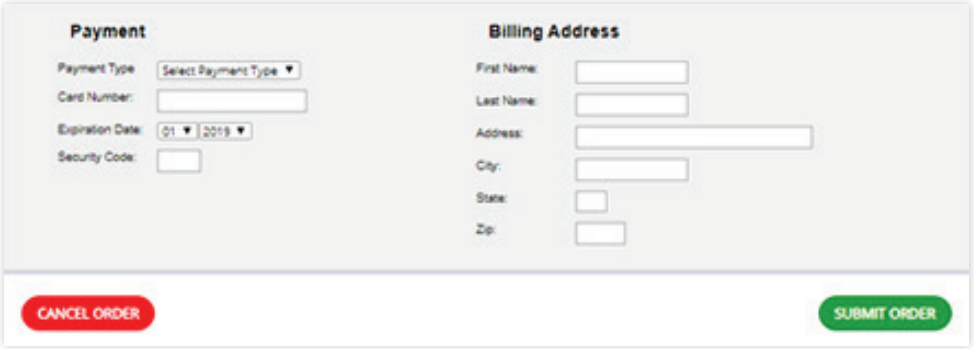


3. If you have an Access Code for a marketing allowance, enter the code.

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

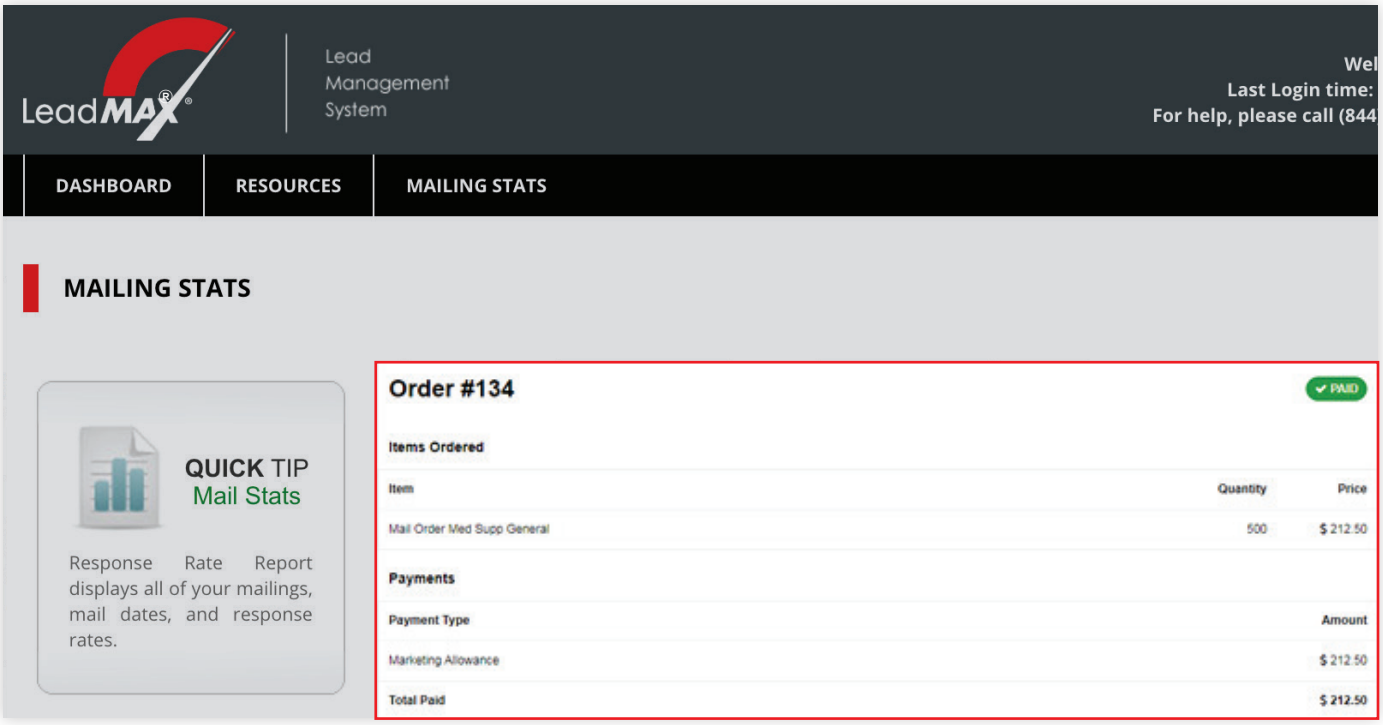


4. If you have a balance due, enter payment information and click on 'SUBMIT ORDER'



Order Completion

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

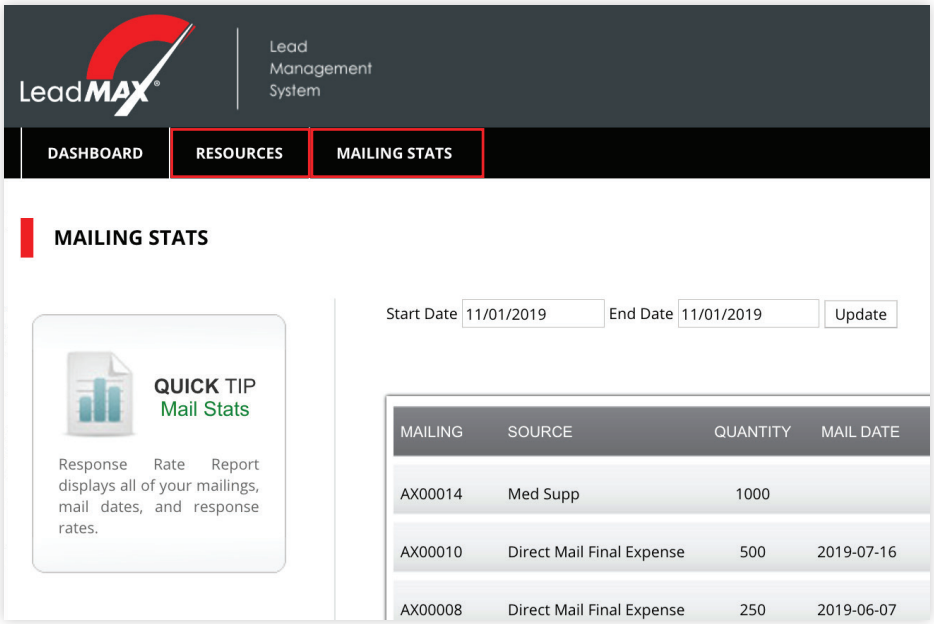


Resources

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.



Leads Overview

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.

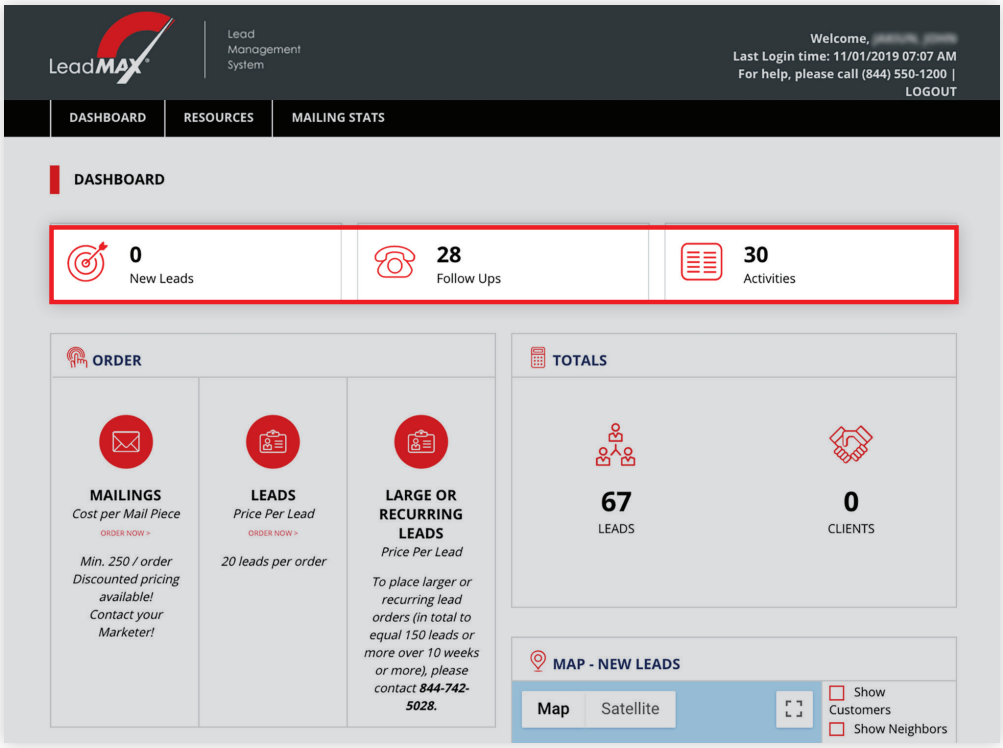
Quick View Links

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.

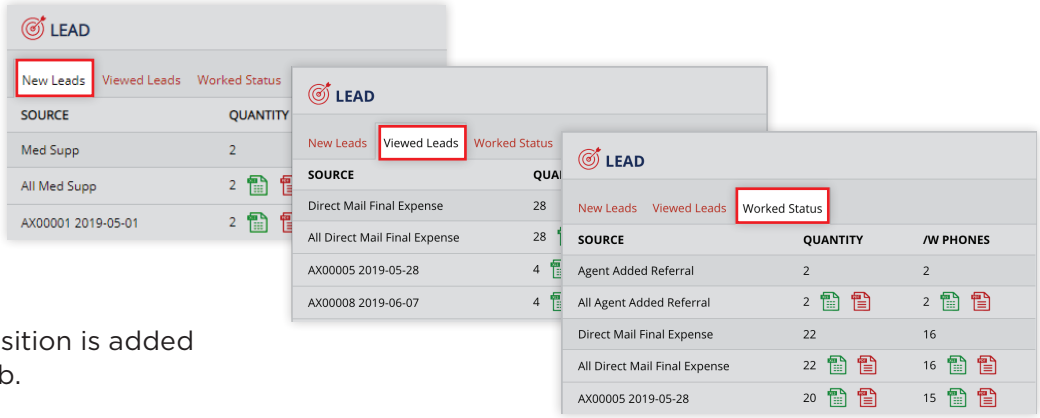


Lead Widget

New Leads - Leads that have not been viewed.

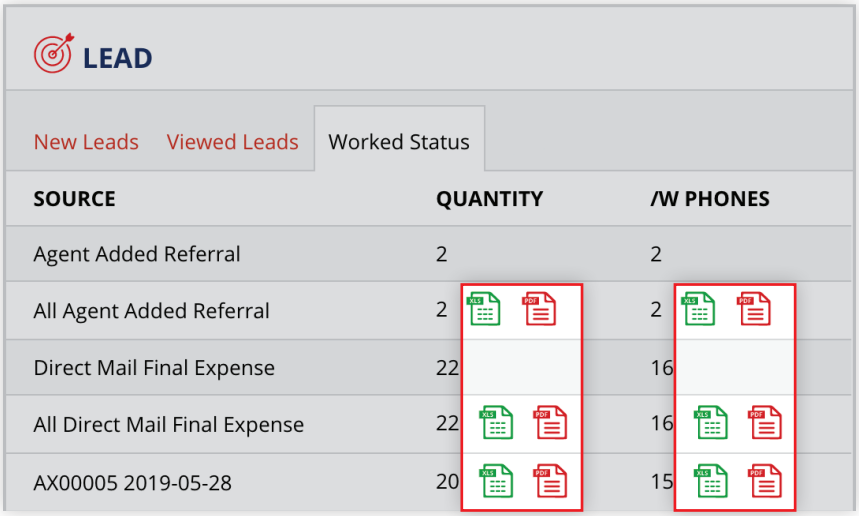
Viewed Leads - When new leads are viewed the leads move to the viewed lead section.

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

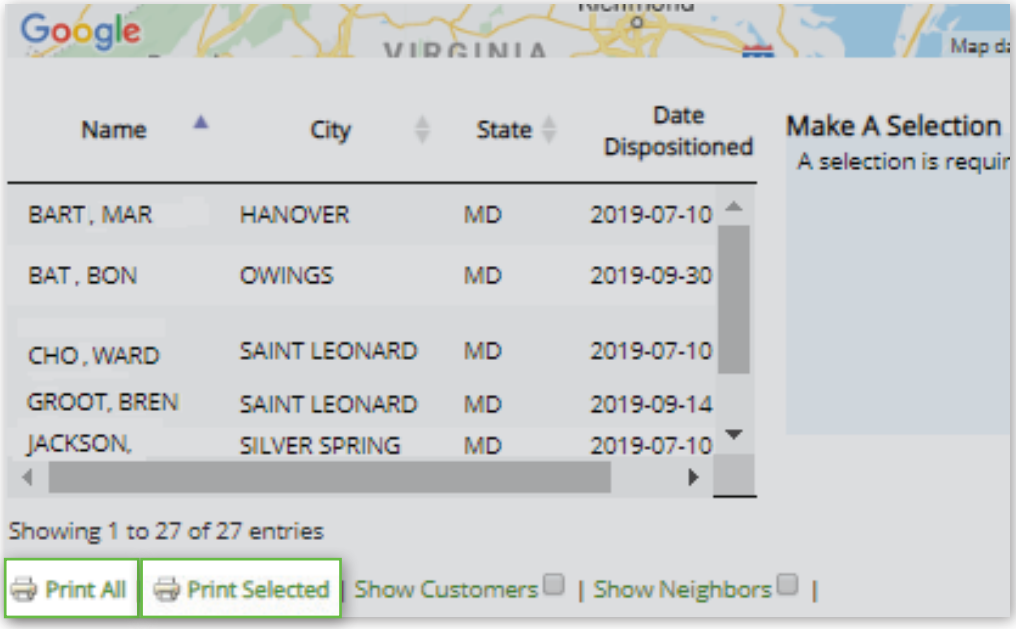


Lead Sheets

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



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



Anatomy of a Leadsheet

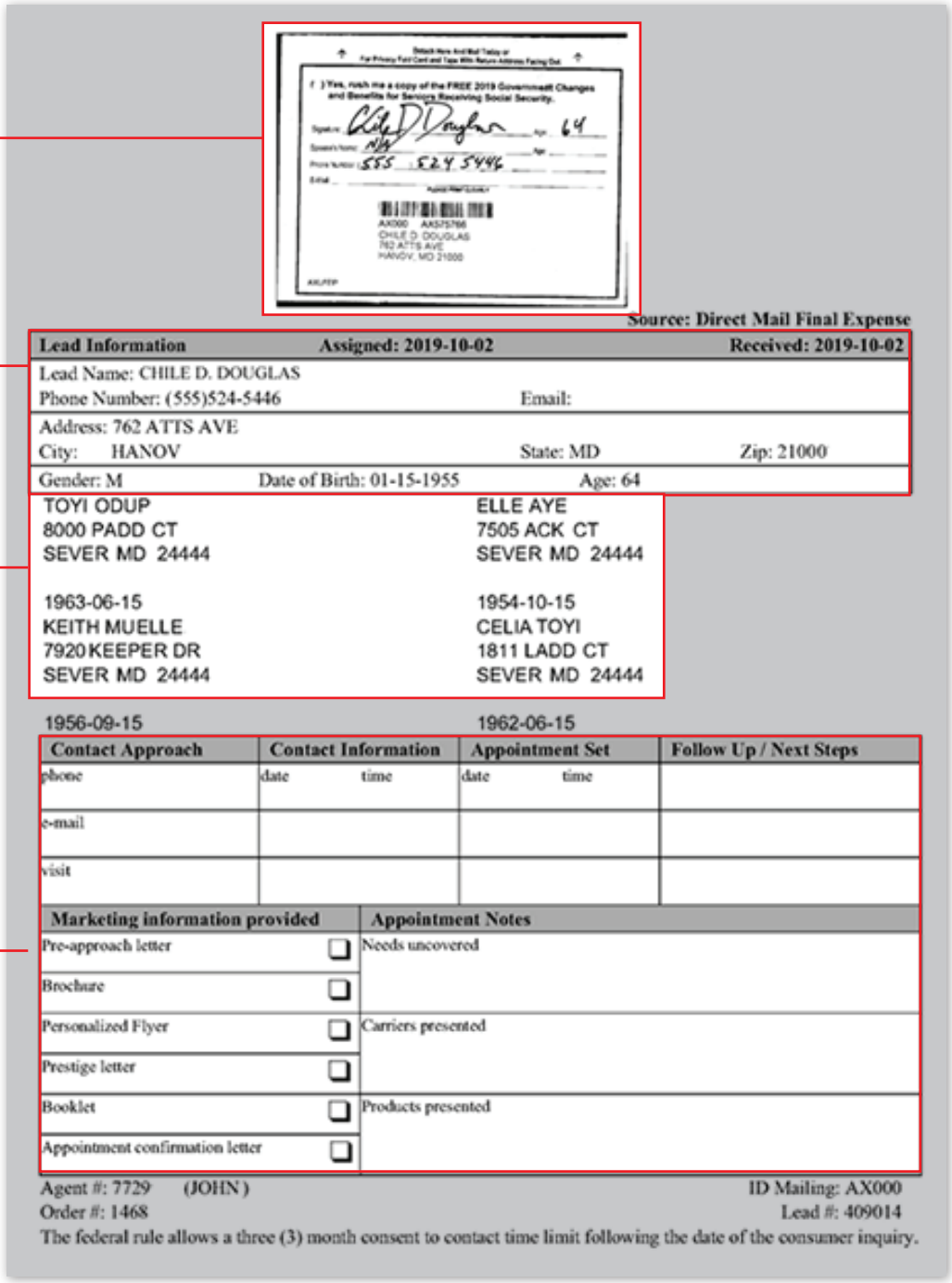
After clicking on the red icon to open a PDF file of your leads, the lead sheet will display.

Completed lead card

Lead information

Non-Responder Neighbors

Lead follow-up form



Source: Direct Mail Final Expense

Lead Information	Assigned: 2019-10-02	Received: 2019-10-02
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

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

1956-09-15 1962-06-15

Contact Approach	Contact Information	Appointment Set	Follow Up / Next Steps
phone	date time	date time	
e-mail			
visit			

Marketing information provided		Appointment Notes
Pre-approach letter	☐	Needs uncovered
Brochure	☐	
Personalized Flyer	☐	Carriers presented
Prestige letter	☐	
Booklet	☐	Products presented
Appointment confirmation letter	☐	

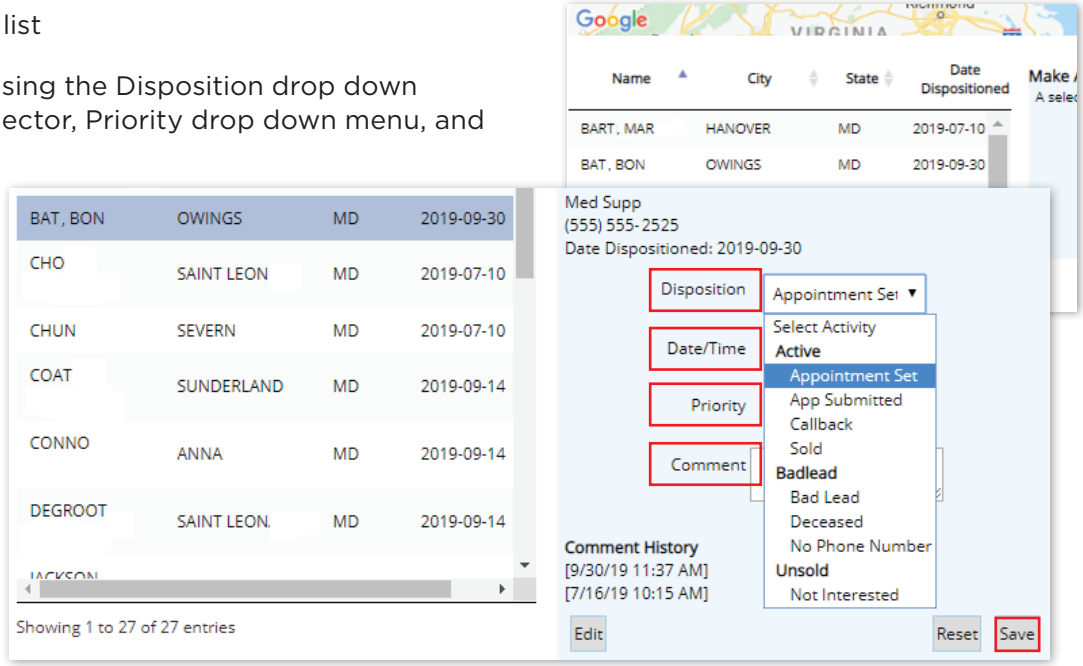
Agent #: 7729 (JOHN) ID Mailing: AX000
Order #: 1468 Lead #: 409014
The federal rule allows a three (3) month consent to contact time limit following the date of the consumer inquiry.

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

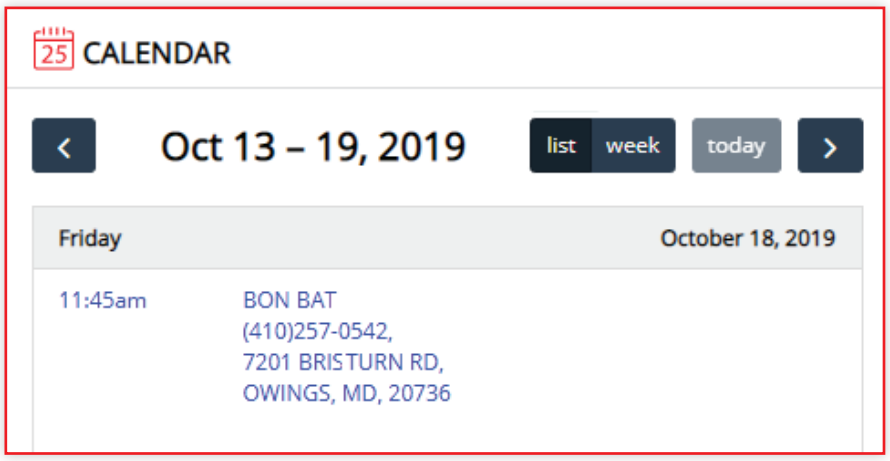
1. Complete the form using the Disposition drop down menu, Date/Time selector, Priority drop down menu, and comment field.
2. Click the Save button (a change in the comment history will verify the disposition saved.)



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

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

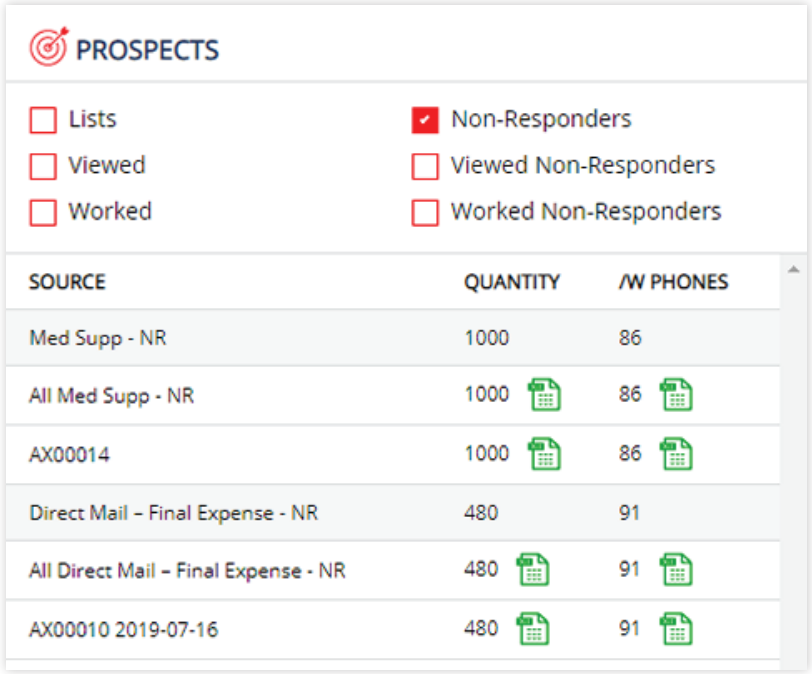
Tip: Clicking on the calendar header will open a larger version of the calendar



Prospects widget

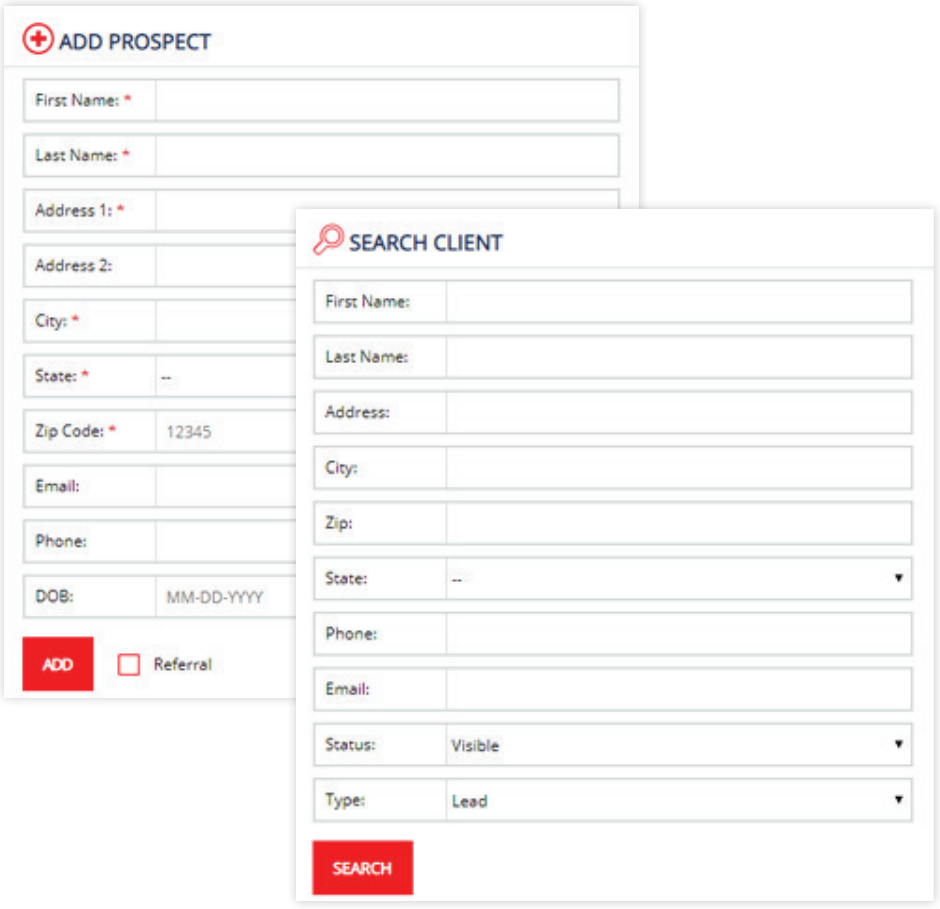
After placing order, you can view Non-Responders from the mailing campaign that was purchased using the Prospects widget.

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.



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.