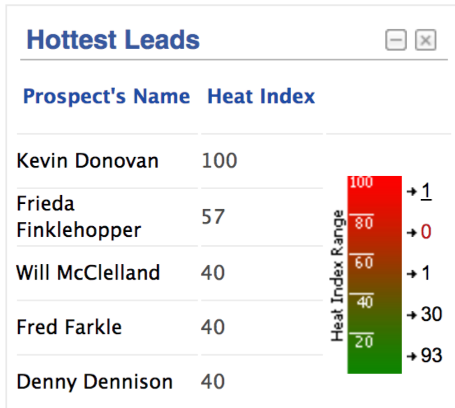
Working with the Heat Meter to find active leads in your Sales system

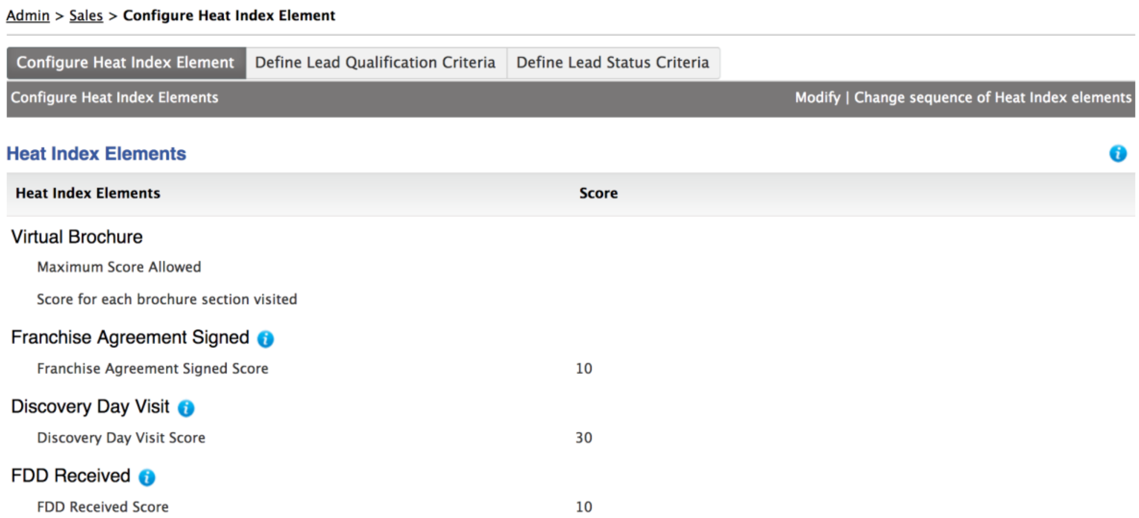
A successful franchise is always looking to expand business, and generating leads is the key to this success. To help track top leads, FranConnect displays the 5 hottest leads right on the homepage of the Sales module. This list is generated by the lead activity throughout system. For a more accurate reading however, you may need to configure what is referred to as the **Heat Meter** and apply weight to what is most important to you.



To configure your Heat Meter, go to **Admin > Sales > Define Lead Attributes**. You may update the heat index elements, lead qualification criteria, and the lead status criteria's in your system. The Heat Index Elements are the most important activities that reflect a hot and responsive lead.

Note: Depending upon your implementation, you may not see all options listed in this article. For example, the Virtual Brochure is not going to be in everyone's system because it comes with an additional cost.

The order of the elements can be updated and changed by selecting "**Change sequence of Heat Index elements**" at the top-right of the page. You may reorder per your business practices to best suit your needs.



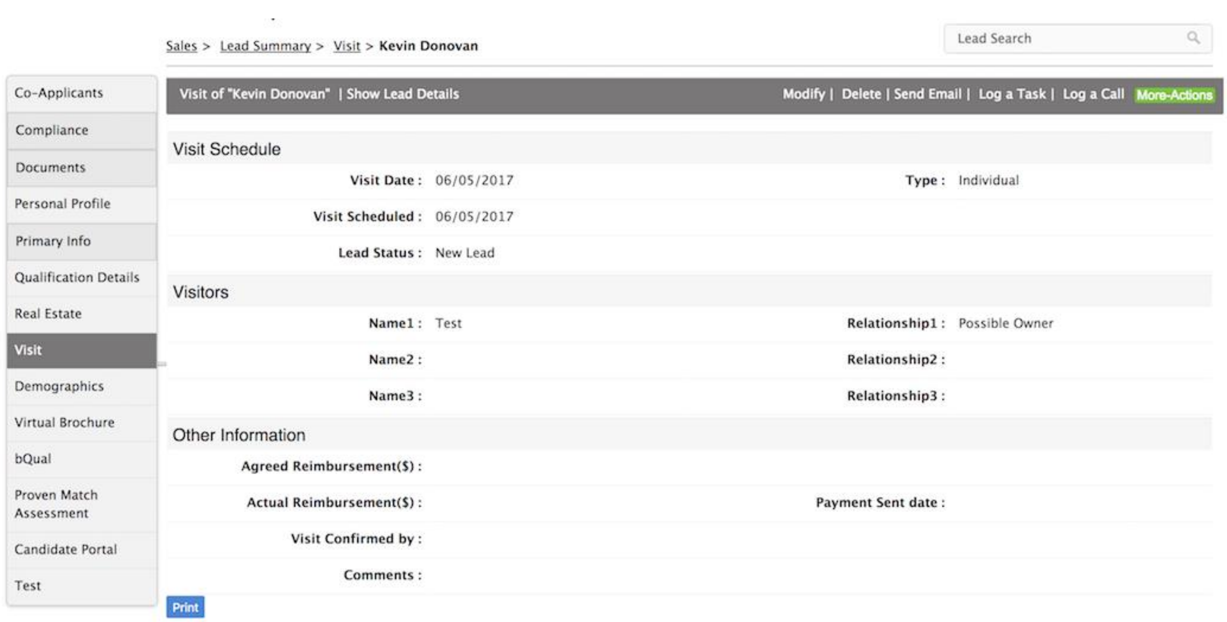
A score value can be set for each activity by selecting **Modify** at the top right of the page.

The score topics are:

1. **Discovery Day Visit**

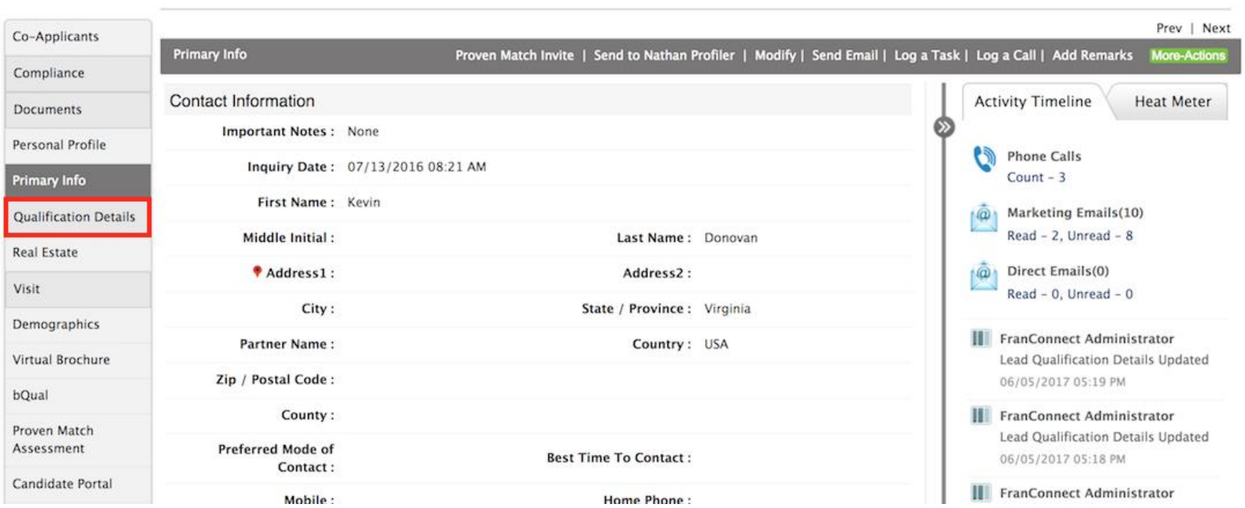
Within the Lead Summary there is a section called **Visit**. This is for filling out Discovery day information and tracking expenses, who visited on the discover day with the lead, and other important information.

By updating the "**Visit Scheduled**" date field, the lead will be marked as complete for the Discovery day and the system will award points to the lead for the Heat Meter.



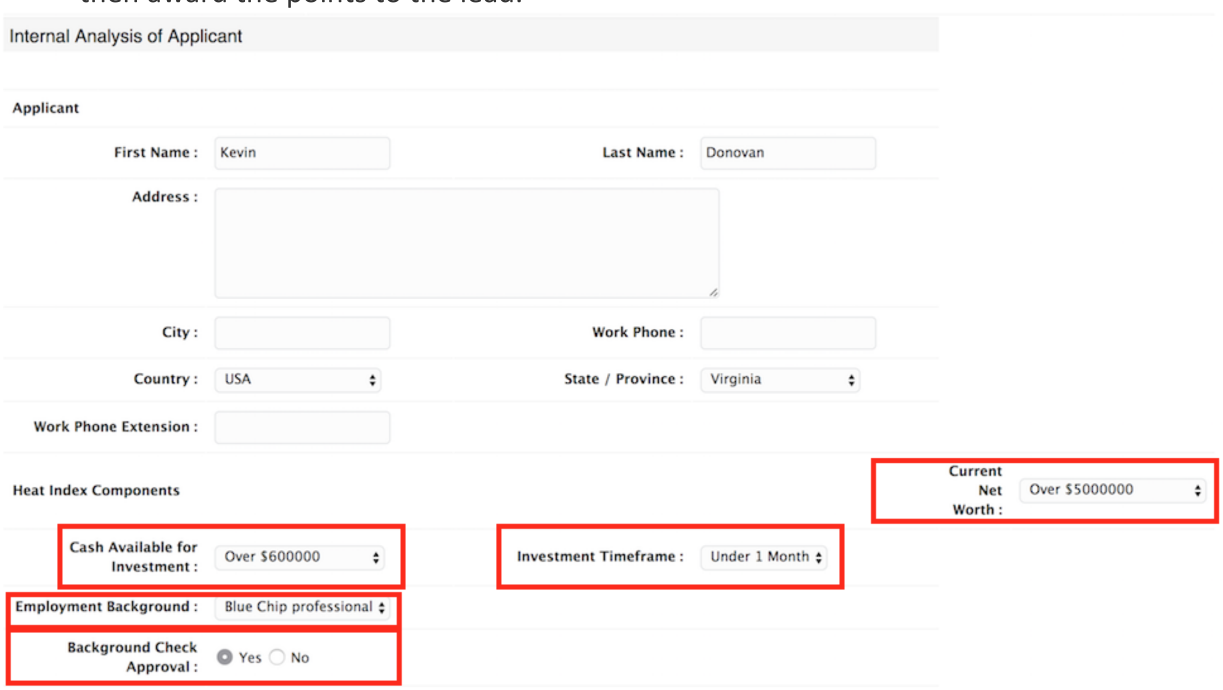
2. Qualification Form

"**Score for form completion**" is awarded when the user submits information on the Qualification web form. Several components on the Heat Meter are found within the lead profile itself. Under **Qualification Details**, you will see "**Heat Index Components**".



Background Check Approval: in the "**Heat Index Components**" where selecting Background Check Approval, choose Yes to award the points to the lead.

Cash Available for Investment Score: in the "**Heat Index Components**" where selecting Cash Available for Investment, choose the amount that best matches the lead. This will then award the points to the lead.



The same can be done for: Net Worth Score, and Investment Timeframe Score.

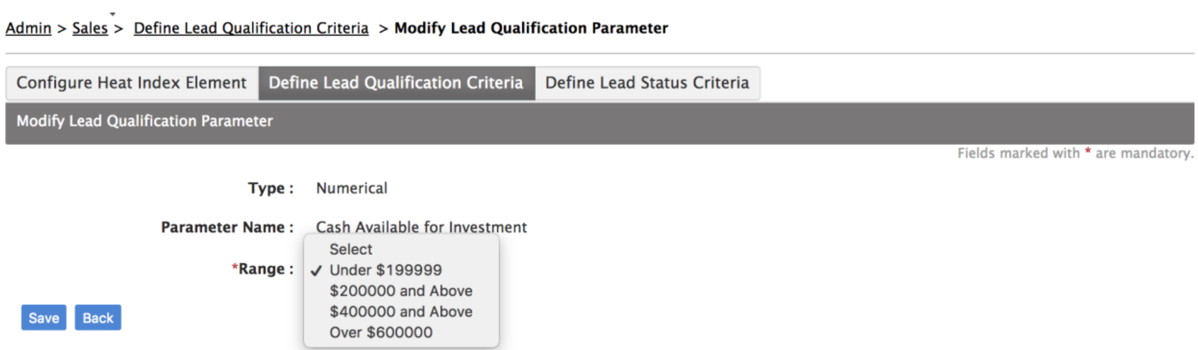
3. Qualification Met

For a lead to get the Qualification Met status, they must match all the criteria set below. If a section does not match what you require for a lead to be considered, mark the section as Not Applicable.

First update the tab for "Define Lead Qualification Criteria"

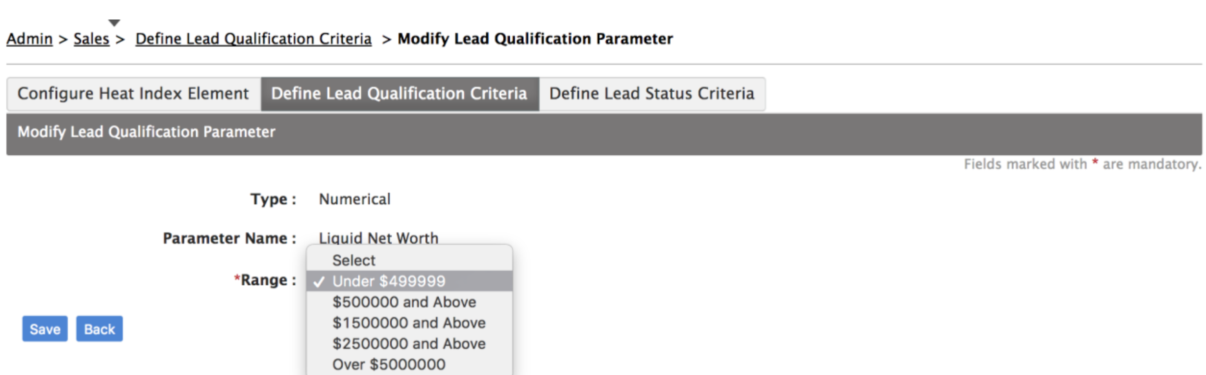
4. Cash Available for Investment:

can be set to: Under 199999, 200000 and above, 400000 and above, or over 600000.



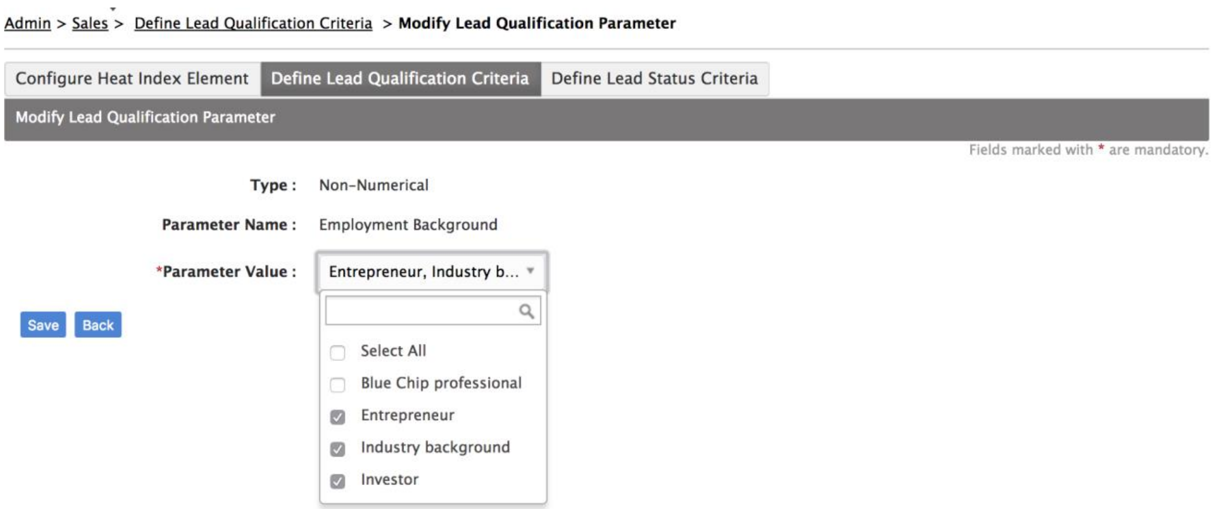
5. Liquid Net Worth:

can be set to: Under $499999, $500000 and above, $1500000 and above, $2500000 and above, and over $5000000.



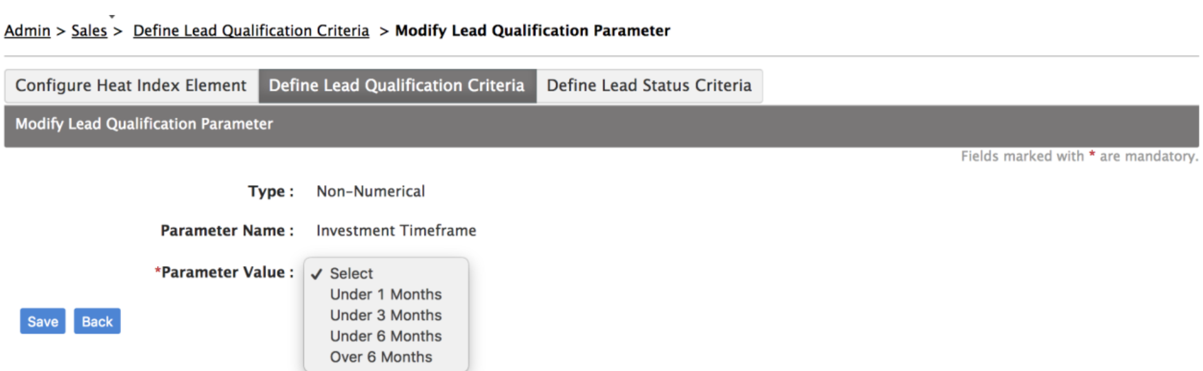
6. Employment Background:

This can be set to: Blue Chip professional, Entrepreneur, Industry background, and Investor



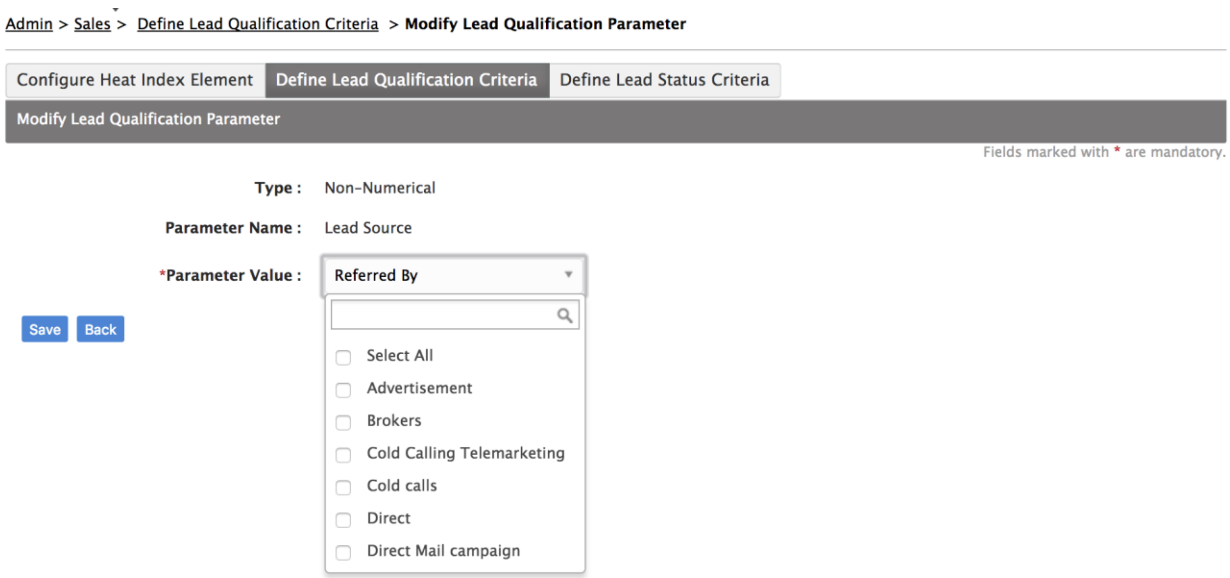
For most systems, this would usually be marked as not applicable unless their background is important for your industry.

7. **Investment Timeframe**: This may be set to: Under 1 month, Under 3 months, Under 6 months, and Over 6 months



8. Lead Source:

This will list all lead sources in your system. In most cases you would be considering any leads that are coming into your system, so marking this as not applicable makes sense for most. Note: If the lead meets all the criteria **except** for “Lead Source”, then they would not be considered a Qualification met Lead. This is because the lead did not match all the required fields. Please make sure to deactivate any sections that may exclude leads from being included in the Heat Meter.

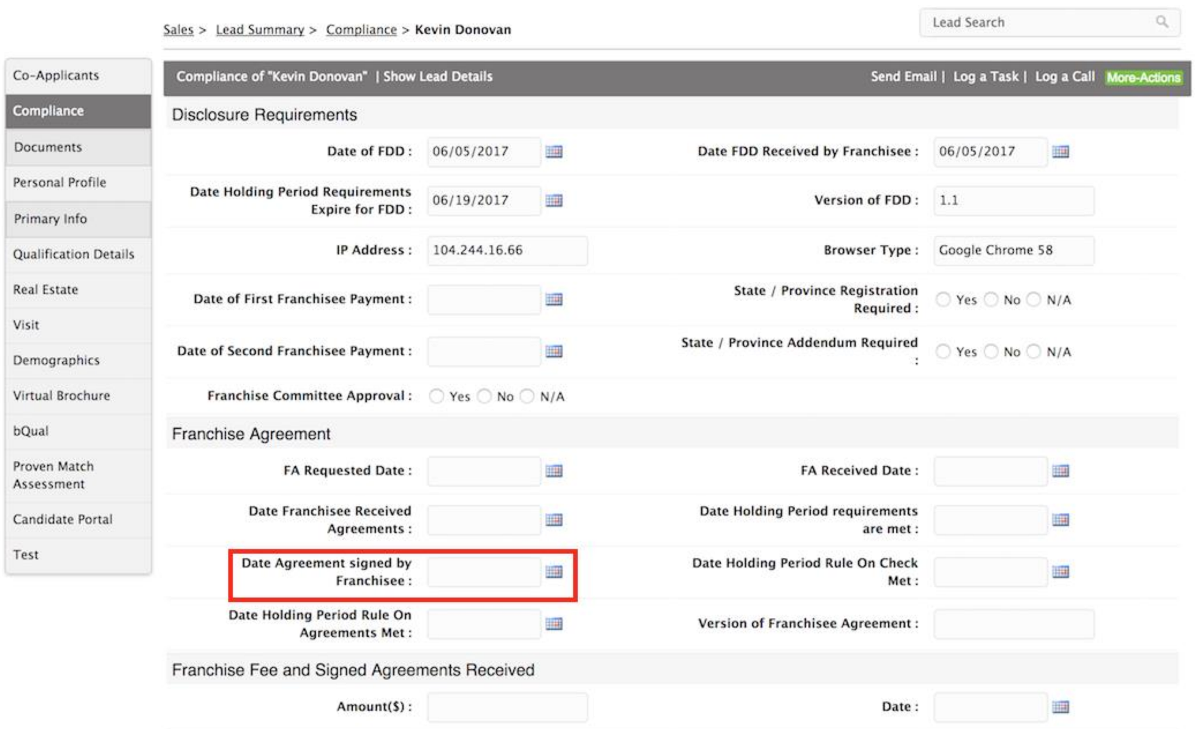


When all of the above criteria match for the lead, they are marked as Qualified and the score is updated in the Heat Meter. For example:

Liquid Net Worth: $1500000 and above
Employment Background: Inactive
Investment Timeframe: Under 6 months
Lead Source: Direct

9. Franchise Agreement Signed:

This score is given when the lead signs the FDD. The field "**Date Agreement signed by Franchisee**" will not automatically populate in in the compliance section. A user would need to update this field to award the points for the lead.

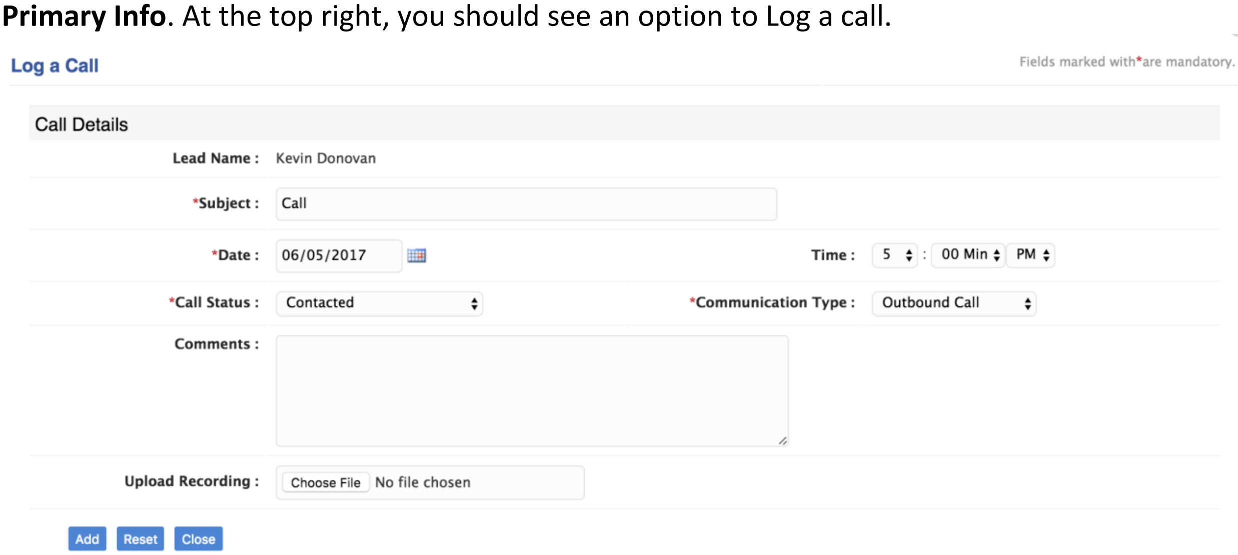


10. FDD Received

FDD Received Score: the lead is awarded these points when the FDD is downloaded on the user's computer.

11. Phone Calls

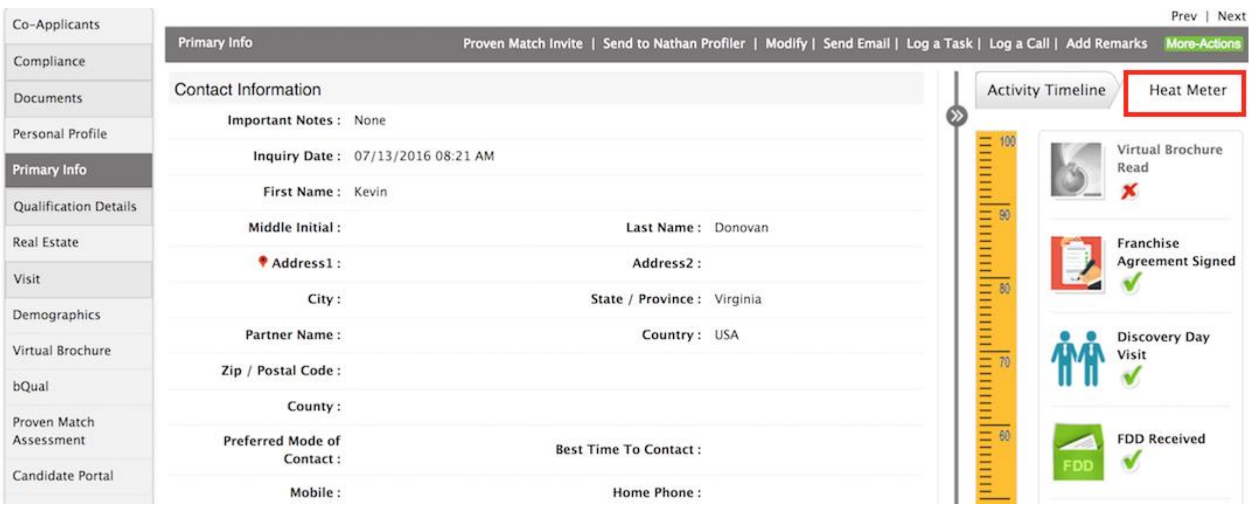
Phone calls are recorded by logging calls in the leads information in **Sales > Lead Summary > Primary Info**. At the top right, you should see an option to Log a call.



12. **Marketing Emails**:

These are emails sent through the system by email campaigns. Scores can be created by being opened, and by clicking on links on the emails.

By completing each task, the Heat meter will grow and fill out. The Meter can be seen in the leads information on the right side of the screen. It will also mark each section with a green checkmark showing what has been completed in the system



The score will be awarded on completion of the tasks or when the lead meets the qualification for each criteria. The top hottest leads will show on the Home page of **Sales**. This allows you to quickly see who is most active in your system.