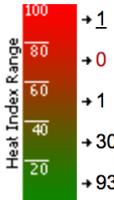


## Working with the Heat Meter to find active leads in your Sales system

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.

Hottest Leads	
Prospect's Name	Heat Index
Kevin Donovan	100
Frieda Finklehopper	57
Will McClelland	40
Fred Farkle	40
Denny Dennison	40



The Heat Index Range scale is a vertical color gradient bar ranging from 0 to 100. The colors transition from green at the bottom (0) to red at the top (100). Tick marks are placed at 20, 40, 60, 80, and 100. To the right of the scale, change indicators are shown: +1 at 100, +0 at 80, +1 at 60, +30 at 40, and +93 at 20.

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.

Configure Heat Index Element	Define Lead Qualification Criteria	Define Lead Status Criteria
Configure Heat Index Elements		Modify   Change sequence of Heat Index elements

Heat Index Elements ?

Heat Index Elements	Score
Virtual Brochure	
Maximum Score Allowed	
Score for each brochure section visited	
Franchise Agreement Signed <span style="color: blue;">?</span>	
Franchise Agreement Signed Score	10
Discovery Day Visit <span style="color: blue;">?</span>	
Discovery Day Visit Score	30
FDD Received <span style="color: blue;">?</span>	
FDD Received Score	10

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.

Sales > Lead Summary > Visit > Kevin Donovan Lead Search

Co-Applicants	Visit of "Kevin Donovan"   Show Lead Details	Modify   Delete   Send Email   Log a Task   Log a Call <span style="color: green;">More-Actions</span>
Compliance	Visit Schedule	
Documents	Visit Date : 06/05/2017	Type : Individual
Personal Profile	Visit Scheduled : 06/05/2017	
Primary Info	Lead Status : New Lead	
Qualification Details	Visitors	
Real Estate	Name1 : Test	Relationship1 : Possible Owner
Visit	Name2 :	Relationship2 :
Demographics	Name3 :	Relationship3 :
Virtual Brochure	Other Information	
bQual	Agreed Reimbursement(\$):	
Proven Match Assessment	Actual Reimbursement(\$):	Payment Sent date :
Candidate Portal	Visit Confirmed by :	
Test	Comments :	

[Print](#)

## 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**”.

The screenshot shows a lead profile page with a sidebar on the left containing navigation options: Co-Applicants, Compliance, Documents, Personal Profile, Primary Info, **Qualification Details** (highlighted with a red box), Real Estate, Visit, Demographics, Virtual Brochure, bQual, Proven Match Assessment, and Candidate Portal. The main content area is titled 'Primary Info' and includes a header with actions: Proven Match Invite, Send to Nathan Profiler, Modify, Send Email, Log a Task, Log a Call, Add Remarks, and More-Actions. Below this is the 'Contact Information' section with fields for Important Notes (None), Inquiry Date (07/13/2016 08:21 AM), First Name (Kevin), Middle Initial, Last Name (Donovan), Address1, Address2, City, State / Province (Virginia), Partner Name, Country (USA), Zip / Postal Code, County, Preferred Mode of Contact, Best Time To Contact, Mobile, and Home Phone. On the right, there is an 'Activity Timeline' and a 'Heat Meter' section. The Activity Timeline shows: Phone Calls (Count - 3), Marketing Emails(10) (Read - 2, Unread - 8), and Direct Emails(0) (Read - 0, Unread - 0). The Heat Meter section shows three entries from 'FranConnect Administrator' regarding 'Lead Qualification Details Updated' on 06/05/2017 at 05:19 PM and 05:18 PM.

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 screenshot shows the 'Internal Analysis of Applicant' form. The 'Applicant' section contains fields for First Name (Kevin), Last Name (Donovan), Address, City, Work Phone, Country (USA), State / Province (Virginia), and Work Phone Extension. The 'Heat Index Components' section includes several dropdown menus and radio buttons, all highlighted with red boxes: 'Cash Available for Investment' (Over \$600000), 'Investment Timeframe' (Under 1 Month), 'Current Net Worth' (Over \$5000000), 'Employment Background' (Blue Chip professional), and 'Background Check Approval' (Yes selected).

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.

[Admin](#) > [Sales](#) > [Define Lead Qualification Criteria](#) > [Modify Lead Qualification Parameter](#)

The screenshot shows a web interface for configuring lead qualification criteria. At the top, there are three tabs: 'Configure Heat Index Element', 'Define Lead Qualification Criteria' (which is active), and 'Define Lead Status Criteria'. Below the tabs is a header 'Modify Lead Qualification Parameter' and a note 'Fields marked with \* are mandatory.' The form contains the following fields: 'Type' is set to 'Numerical'; 'Parameter Name' is 'Cash Available for Investment'; and '\*Range' is a dropdown menu with options: 'Select', 'Under \$199999' (checked), '\$200000 and Above', '\$400000 and Above', and 'Over \$600000'. At the bottom left, there are 'Save' and 'Back' buttons.

### 5. Liquid Net Worth:

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

[Admin](#) > [Sales](#) > [Define Lead Qualification Criteria](#) > [Modify Lead Qualification Parameter](#)

The screenshot shows a web interface for configuring lead qualification criteria. At the top, there are three tabs: 'Configure Heat Index Element', 'Define Lead Qualification Criteria' (which is active), and 'Define Lead Status Criteria'. Below the tabs is a header 'Modify Lead Qualification Parameter' and a note 'Fields marked with \* are mandatory.' The form contains the following fields: 'Type' is set to 'Numerical'; 'Parameter Name' is 'Liquid Net Worth'; and '\*Range' is a dropdown menu with options: 'Select', 'Under \$499999' (checked), '\$500000 and Above', '\$1500000 and Above', '\$2500000 and Above', and 'Over \$5000000'. At the bottom left, there are 'Save' and 'Back' buttons.

## 6. Employment Background:

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

Admin > Sales > Define Lead Qualification Criteria > Modify Lead Qualification Parameter

---

Configure Heat Index Element   Define Lead Qualification Criteria   Define Lead Status Criteria

Modify Lead Qualification Parameter Fields marked with \* are mandatory.

Type : Non-Numerical

Parameter Name : Employment Background

\*Parameter Value : Entrepreneur, Industry b... ▼

- Select All
- Blue Chip professional
- Entrepreneur
- Industry background
- 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

Admin > Sales > Define Lead Qualification Criteria > Modify Lead Qualification Parameter

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Configure Heat Index Element   Define Lead Qualification Criteria   Define Lead Status Criteria

Modify Lead Qualification Parameter Fields marked with \* are mandatory.

Type : Non-Numerical

Parameter Name : Investment Timeframe

\*Parameter Value :  Select

- Select
- Under 1 Months
- Under 3 Months
- Under 6 Months
- 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.

[Admin](#) > [Sales](#) > [Define Lead Qualification Criteria](#) > **Modify Lead Qualification Parameter**

Configure Heat Index Element   **Define Lead Qualification Criteria**   Define Lead Status Criteria

Modify Lead Qualification Parameter

Fields marked with \* are mandatory.

Type : Non-Numerical

Parameter Name : Lead Source

\*Parameter Value :

Referred By

  
 Select All  
 Advertisement  
 Brokers  
 Cold Calling Telemarketing  
 Cold calls  
 Direct  
 Direct Mail campaign

[Save](#)   [Back](#)

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.

Sales > Lead Summary > Compliance > Kevin Donovan Lead Search

Compliance of "Kevin Donovan" | Show Lead Details Send Email | Log a Task | Log a Call [More-Actions](#)

**Disclosure Requirements**

Date of FDD : 06/05/2017  Date FDD Received by Franchisee : 06/05/2017

Date Holding Period Requirements Expire for FDD : 06/19/2017  Version of FDD : 1.1

IP Address : 104.244.16.66  Browser Type : Google Chrome 58

Date of First Franchisee Payment :  State / Province Registration Required :  Yes  No  N/A

Date of Second Franchisee Payment :  State / Province Addendum Required :  Yes  No  N/A

Franchise Committee Approval :  Yes  No  N/A

**Franchise Agreement**

FA Requested Date :  FA Received Date :

Date Franchisee Received Agreements :  Date Holding Period requirements are met :

**Date Agreement signed by Franchisee :**

Date Holding Period Rule On Agreements Met :  Date Holding Period Rule On Check Met :

Version of Franchisee Agreement :

**Franchise Fee and Signed Agreements Received**

Amount(\$):  Date:

## 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.

**Log a Call** Fields marked with\*are mandatory.

**Call Details**

Lead Name : Kevin Donovan

\*Subject :

\*Date : 06/05/2017  Time : 5  : 00 Min  PM

\*Call Status :  \*Communication Type :

Comments :

Upload Recording :  No file chosen

