

Agency Manager

- Use KPIs in this .pdf for ALL positions

Checklist Style:

- All KPI reports submitted from all positions (daily)
- Employee sign in and sign out (daily)
- Problems handled and training provided by manager in company training area to keep same problem from happening again (daily)

Sales Position #1 (In House Call Center)

- 4 hours of dialing should equal at least 100 dials/hour. Anything between 200-400 dials per day is acceptable, nothing less once they know how to use the dialer system properly.
- Out of a day of dialing (4 hours), you should have anywhere from 10-20+ leads marked as “hot leads” in Sales Dialers account that can be followed up with by Position #2 “Closer”.
- 1 city per day dialed per position #1 staff member
- Minimum 200-600 dials per day in Sales Dialers
- Time on dialer (daily)
- # of dials (daily)
- # of answers (daily)
- # hot leads in (daily)

Sales Position #2 (In House Call Center)

- Out of a day of closing, you should have anywhere from 10-20+ leads called, with 2-5 clients closed (money up front, in the bank).
- # of dials to hot leads
- # DMs
- # Pitches
- # Clients
- Bonus: # of referrals dialed

Campaign Manager

- 2 campaigns created per day, 5 days a week. This is for one new hire, the capacity to run up to 10 new clients a week.
- Optimization: (Daily and Weekly, reports to manager)
 - Impressions
 - Clicks
 - Calls
 - Conversions

Billable Leads (Tracked in Kallzu 2.0) Start HERE and back track

Customer Onboarding

Checklist Style:

- # of dials made (daily and weekly)
- Date (time stamp) when each call was made
- What was covered on the call with client
- # of reups (weekly) and amounts on each reup for a client, new or existing

Customer Support

Checklist Style:

- # of dials made (daily and weekly)
- Date (time stamp) when each call was made
- What was covered on the call with client
- # of reups (weekly) and amounts on each reup for a client, new or existing
- If any issues reported by the client, immediately reported to the manager as well as noted in the daily report