DHCD Leads Tracking Process

1. Leads received from DHCD are imported into AT and uploaded to Hancock.

2. If there are cities missing from the Hancock list, the customer cannot be uploaded. Upload manager will provide a list of cities that need to be added, and forwarded to DHCD. Once added, the upload manager should be notified so that remaining customers can be uploaded.

3. The "Duplicates – Hancock" report should be run (Custom Reports tab), and DHCD requested to free up these leads. These are leads that already exist in Hancock under another contractor's account and presumably are being reassigned to us.

4. The "Duplicates – AT" report should be run (Custom Reports tab). These are leads that already existed in AT, based on the street address. Many of these are leads from previous DHCD lead sheets. Many were never successfully converted, many were deferrals, many were completed and are not eligible for more work. Some go back to the old LIEEP programs. This report searches both the active and archive databases. When beginning to contact customer for their audit, this report should be referenced. You can click on the duplicate customer name within the report to pull up the duplicate account on the Customer tab for review.

5. The initial "Homeowner Letters" report should be run (Reports tab), printed, and mailed to the homeowner customers. This is the report to let the customer know that they should expect Efficient Home to be calling them to set up an audit appointment.

6. The "Renter Letters" report should be run, printed, and mailed to the renters. Once successfully printed, the "Mark Renter Letter Sent" button at the top or bottom of the report should be clicked. This will prevent the same customers from appearing in the report if it is re-run in the future.

7. When beginning to contact customers, the DHCD Status Report should be run. This can act as the main list to call customers from, in conjunction with the "Duplicates – AT" report. If multiple people are making scheduling calls, the report should be refreshed periodically so that appointments and/or notes entered by others are visible. You can click on the customer name to bring up their record on the Customer tab.

8. ***IMPORTANT*** Every unsuccessful call should be documented in the customer notes so that everyone knows how many times and when the customer contact attempts have been made. It is NOT necessary to document a call that resulted in a successful scheduled appointment – the appointment itself serves that purpose.

9. For customers who have proven difficult to contact, the "Homeowner Letter – Unable to Reach" report can be run from the upper right of the Customer tab, when the customer is pulled up.

10. Periodically, the "DHCD Final Letters" report should be run from the Reports tab. This will generate a letter to each customer who has three or more contact attempts without successfully scheduling an audit. Once successfully printed, the "Mark Final Letter Sent" button should be clicked at the bottom of the report. This will prevent them from re-appearing when the report is run in the future.

11. Once a week, the Appointment Reschedule List report should be run, and the customers pulled up by clicking on the customer name. Review the notes on the cancelled appointment. If there will be no rescheduling the customer because they don't want to , a deferral, etc. then change their Customer status to the appropriate status to clear them off the list.