

FAQs

• WHAT IS LEAD ASSIGN?

- Lead Assign is a customer relationship management (CRM) system designed to streamline lead management processes for travel agencies. It automates lead distribution, tracking and follow-up, enhancing efficiency and productivity.

• HOW DOES LEAD ASSIGN WORK?

- Lead Assign automatically assigns incoming leads to the most appropriate agent based on predefined criteria, such as availability, expertise, conversion rate and more. Agents receive notifications and can quickly respond to leads within the system.

• WHERE DO I SIGN UP FOR LEAD ASSIGN?

- Once you pass your assessment, you will be added to the Lead Assign system and be ready to receive leads through the system.

• IS THERE TRAINING AVAILABLE FOR USING LEAD ASSIGN?

- Yes, we have a recorded training that you can access [here](#) or on the Agent Portal.

• CAN I SET MY OWN SCHEDULE ON LEAD ASSIGN?

- Yes, you are able to set your own schedule on lead assign so that when leads are available you are able to set available or not available.

• WHAT TIME ZONE IS LEAD ASSIGN SET TO?

- Since Best Day Ever Vacations headquarters is on the West Coast, everything in Lead Assign is set to pacific standard time (PST).

• CAN I ACCESS LEAD ASSIGN REMOTELY?

- Yes, Lead Assign is accessible from anywhere with an internet connection, allowing you to manage leads and stay productive while on the go.

• HOW ARE LEAD LIMITS PER AGENT DETERMINED?

- Lead limits are based on different criteria such as conversion rates, customer service ratings and availability.

• WHAT IS THE RECEIVING LEAD PROCESS?

- When you are selected to receive a lead you will receive a notification with a timer. You will see two buttons to decline or accept that lead. All of the leads content is disclosed to you except for the contact details of the client. Choosing to accept the lead means you are ready and available to receive the lead and you will be emailed a follow up email with that contact information.

• DOES HITTING THE DECLINE BUTTON PENALIZE ME AS AN AGENT?

- If you decline a lead, you are not penalized in anyway.

• DO I NEED TO LOG-IN TO LEAD ASSIGN?

- You will never need to log into the platform and you will never have to download any software. The only communication that will go to you is either text (if you signed up for SMS) or email. The email and/or text will include quick links for you to access the lead and platform.

• HOW DO I GET INTO THE PLATFORM?

- You will access the platform through the quick links, which is located on the top and bottom of the lead communication. It simply is click and go!



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- **HOW OFTEN LEAD LIMITS DETERMINED?**
 - Lead limits are updated per month for our Agents.
- **HOW DO I LOG INTO MY NEW ACCOUNT WITH LEAD ASSIGN?**
 - You are able to log-in to your account by visiting this page and using the email you have on file with Best Day Ever Vacations. Once you do that, you select forgot password. From there, you will be instructed on how to create an account.
- **CAN I SET UP A FOLLOW UP SCHEDULE?**
 - Yes, Lead Assign allows you to set up a follow up schedule through their calendar tool located on the lead. If you schedule a follow up, you will receive a reminder on that date to follow up with the lead.
- **ONCE I HAVE THE LEAD, WHAT INFORMATION DO I HAVE ACCESS TO?**
 - You will be sent a follow up email with all the contact information. Once you access the platform through the quick links, you are then able access other tools. Each lead will have (4) tabs. (1) the contact and lead information for you to access; (2) conversion tab; (3) Admin section; (4) Memos, which allows you to add notes and organize your thoughts with the lead.
- **CAN THE BEST DAY EVER VACATIONS TEAM COMMUNICATE WITH ME THROUGH LEAD ASSIGN?**
 - Yes, through the Admin tab of your lead, the Best Day Ever Vacation Team can leave comments on your lead. Administrators have access to ALL leads within the system. If one of the Admin's leave a comment on your lead, you will receive a notification and you will be able to communicate through the Admin tab.

OTHER RESOURCES

- [BEST DAY EVER VACATIONS TRAINING VIDEO](#)
- [LEAD ASSIGN USER GUIDE](#)
- [LEAD ASSIGN WEBSITE](#)
- [LEAD ASSIGN APP](#)
- [BEST DAY EVER VACATIONS AGENT PORTAL](#)
- [BEST DAY EVER VACATIONS LEAD ASSIGN INFORMATION](#)