



UKG Partner Lead Management

External Guide

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Introduction

This guide will walk you through how to efficiently access the Lead Management tab within the UKG Community, manage inbound and outbound leads, leverage resources, and more. It is one piece of the puzzle supporting our Lead Partner program, designed to boost partner value and enhance business growth.

The Lead Management lifecycle includes:

- Onboarding Users to the Lead Management
- Managing leads in the Lead Management
- Supporting UKG programs such as SPIF and revenue share where applicable
- Continuous optimization and support

Here is a quick snapshot of the Lead Management Lifecycle:



Important:

For this guide, we will focus solely on onboarding users to Lead Management and providing instructions on how to manage leads and leverage the features and functionalities within it.

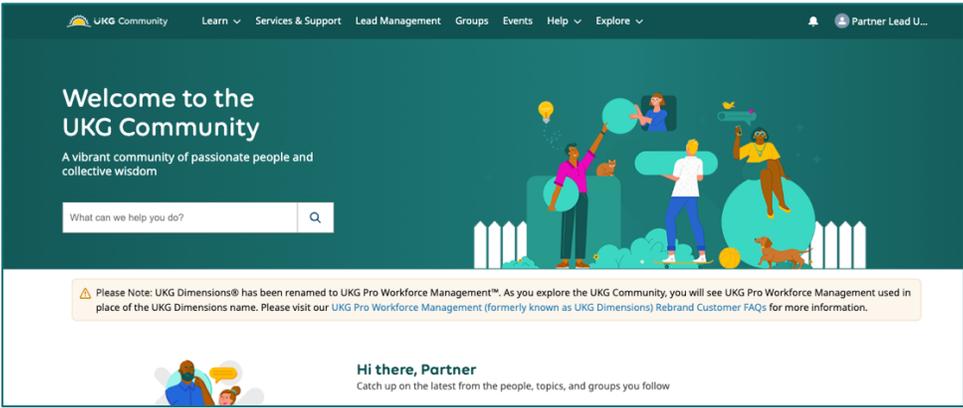
Procedure

1. Access to the UKG Community

To leverage Lead Management, partners must first be granted access to the UKG Community based on key onboarding milestones and specific criteria. Once granted, you will receive an email with activation instructions.

For more information on UKG Community access for partners, please refer to this [guide](#).

Note:
If you have trouble accessing the UKG Community, please refer to this article on [how to contact partner support](#).



2. Access to Lead Management

Members of the UKG Community can benefit from a wide range of features and functionalities. Access begins with general community membership and can be extended to include additional capabilities based on the individual’s role. Lead Management access is one of these extended features. **To utilize Lead Management, members must request and be granted lead user access.**

Request Access to Lead Management

The access request process is initiated during the onboarding phase. At this stage, you will be introduced to your UKG Lead Program Manager, who will provide you with a form to complete. This form is necessary to request partner access and to enable users within Lead Management.

Important:
This form is separate from any onboarding or contact survey forms you may have completed to access the UKG Community. Below is a screenshot of the form for your reference.

Managing Lead Users

As a best practice, leverage the UKG Lead User form to manage users. This includes adding new users or removing users who are no longer relevant. All these actions can be managed within the UKG Lead User form.

You can now easily access this form as one of the key features and functionalities when navigating to Lead Management under the “Manage Lead Users” section.

UKG

UKG Lead User Form

Welcome! This form allows our partners to request access to view, manage, and create sales leads within the UKG Community. Please provide contact details below to either request— or remove— access for a lead user within the Community.

Submitter's Name *

Partner Name *

Please select your partner type: *

Select ▾

Please select an action: *

Select ▾

Send me a copy of my responses

Submit

Powered by smartsheet
[Privacy Notice](#) | [Report Abuse](#)

Navigate to Lead Management

Once you have access to the UKG Community and have requested and received approval for Lead Management access, you can easily navigate to “Lead Management” to enjoy its features and functionalities.

The screenshot shows the UKG Lead Management dashboard. At the top, there is a navigation bar with the UKG Community logo, Home, Learn, Services & Support, Lead Management (highlighted with a yellow box), and More. A search bar on the right contains the text "What can we help you do?". Below the navigation bar, the main content area is titled "Welcome to UKG Lead Management". It includes a welcome message: "Here, UKG partners can manage inbound and outbound leads, submit leads to UKG sales teams, and access helpful resources on the lead management process - all in one place." To the right, there is a "Have a question?" section with the text "242,886 amazing members are here to help" and a blue button labeled "Ask the Community". Below this, a section titled "What would you like to do?" contains four cards: "Manage Leads" (with sub-links for My Inbound Leads and My Outbound Leads), "Create Leads" (with a link for New Lead to UKG), "Lead Management Resources" (with a link for Download the Lead Management guide), and "Manage Lead Users" (with a link for Request Lead User Change). At the bottom, there is an "Additional Assistance" section with the text: "Should you require assistance when creating or managing a lead, please reach out to us at partner.leads@ukg.com."

Navigate to Lead Management to:

- **Manage Leads:** Oversee all your lead activities.
 - **My Inbound Leads:** View leads sent to you.
 - **My Outbound Leads:** Track leads you’ve sent to UKG.
- **Create Leads to UKG:** Submit new leads to UKG.
- **View the Lead Management Guide:** Access detailed instructions.
- **Manage Lead Users:** Submit a request to add or remove new lead users.

Important:

If you need assistance with accessing Lead Management, or with viewing, managing, or creating leads, please contact us at partner.leads@ukg.com

3. Utilize Lead Management Features

Once you have access, you can begin utilizing the features and functionalities of Lead Management.

Manage Inbound Leads

As part of managing leads, you will receive alerts from various sources, including UKG resources (via Salesforce or the UKG Marketplace) and directly from customers or prospects through the UKG Marketplace. Regardless of their origin, all leads are directed to the UKG Community Lead Management section for thorough review and necessary updates.

Below is a brief overview of the lead source, including the submitters and their respective recipients:

Lead Source	Submitted By	Submitted To
UKG Salesforce	UKG resources	Partners
UKG Marketplace	UKG resources Customers Prospects	Partners
UKG Community	Partners	UKG Sales

1. Receive Lead Alert

Individuals with UKG Community Lead Management access will receive email alerts whenever a new lead is created. These emails will include essential lead details such as the company’s name, location, number of employees, and any other relevant information.

Click on the very first link at the top of the lead alert to be redirected to Lead Management, where you can manage the lead accordingly.

Important:

Please note you need to be logged in to the UKG Community to access the lead directly.

[External Origin] Sandbox: UKG Lead Alert - HireRight
A new lead has been submitted to HireRight for your review and action.
Please update the Lead Status using the link below. (Reference the UKG Community Leads Manager Guide for step-by-step instruction.)
[Link](#)

Partner Name: HireRight
Partner Service: Screening / Background Checking

Contact First: UKG Resource
UKG Email: test@ukg.com
UKG Phone: 1231231234

Company: Test Community Account
Name: Test Testing
Country: USA
City: LOWELL
State: MA
Zip Code: 01851
Phone: 1231235555
Email: test@customer.com
No. of Employees: 1
Number of Countries:
Comments: Test lead submission.

Internal UKG : Follow the Link for lead record [Link](#)

2. View and Manage Leads

Once you click on the link and are redirected, you can start viewing and managing that specific lead. To view all leads, navigate to Lead Management and select “My Inbound Leads.”

Here you’ll find two report views:

1. **My Inbound Leads – Submitted:** Leads with a *Submitted* status.
 - a. Note that all new, inbound leads will default to *Submitted* status.
2. **My Inbound Leads – All:** Leads with all statuses.

Home > Lead Management

My Inbound Leads

Review and manage leads sent from the UKG Marketplace or internal UKG resources.

My Inbound Leads - Submitted | My Inbound Leads - All

Report: Leads
My Inbound Leads - Submitted

Total Records: 22

Partner Name	Create Date	Lead Number	First Name	Last Name	Company / ...	State/Provi...	Email	Lead Status	Deal Status	Partner Deal Value
HireRight (2)	9/5/2024	LD-02215802	Cortney	Whaley	YMCA OF THE NORTHERN SKY	ND	whaley@ym	Submitted	-	-
	9/5/2024	LD-02215795	Julie	Dodge	YMCA of Central Ohio	-	jdodge@ym	Submitted	-	-
	9/5/2024	LD-02215788	Brett	Hartsell	Urgent Dental Center	-	brett@urger	Submitted	-	-
	9/5/2024	LD-02215729	Maia	Gunders on	UKG	-	maia.gunde	Submitted	-	-
	9/5/2024	LD-02215733	Jessica	Livers	UKG	-	jessica.liver	Submitted	Closed - Won	USD 5,500.00
	9/5/2024	LD-02215765	Justin	Metcalfe	UKG	-	justin.metca	Submitted	-	-
	9/5/2024	LD-02215785	Taylor	Cook	UKG	-	taylor.cooki	Submitted	-	-
	9/5/2024	LD-02215789	Kevin	Harrison	TRG Agency	-	kevin.harris	Submitted	-	-
	9/5/2024	LD-02215783	Justin	Shaw	Stepowoy Enterprises	-	justin.shaw	Submitted	-	-
	9/5/2024	LD-02215784	Sherry	Kaufma n	SHELBY COUNTY CHRIS A MYRTLE MEMORIAL	-	skaufman@	Submitted	-	-

Row Counts Detail Rows Subtotals Grand Total

3. How to Edit Lead Information

As a best practice, regularly update lead status and relevant information as the lead progresses. You can edit lead information or status in two main ways:

Inline Editing in Reports

- To update multiple fields at once, select “Enable Field Editing” in the report. Then, hover over a cell and click the pencil icon. This will enable editing for all other editable fields.
 - Change as many fields as needed.
 - Click “Save” at the bottom of the report once you’re done.

Report: Leads																				
My Inbound Leads - Submitted																				
Total Records																				
20																				
<input type="checkbox"/> Partner Name	↑	▼	Create D...	▼	Lead Number	▼	First Na...	▼	Last N...	▼	Company / Account	▼	State/Provi...	▼	Email	▼	Lead Status	▼	Deal Status	
<input type="checkbox"/>			HireRight (20)		9/25/2024		LD-02215812		Test		Testing		Test Community Account		MA		test@custom		Submitted	

Editing Within the Lead Record:

- Click on the lead’s name or company in the report to view and edit additional details.
- To edit specific fields within the lead record, click the pencil in the field you want to update or select the “Edit” button in the header of the lead.
 - Edit fields as needed.
- Don’t forget to hit “Save” when you’re finished.

Home > Lead Management > Lead Detail

Lead
Test Testing

+ Follow Edit Printable View

UKG Email: test@ukg.com UKG Phone: (123) 123-1234

Submitted Partner - Rejected Customer Cancelled Converted

Details Feed Related

Partner Name	Lead Status
HireRight	Submitted
Partner Service	Rejected Reason
Screening / Background Checking	

4. Key Fields to Edit

When managing your leads, please update the following key fields as needed, either through inline editing or directly within the lead record:

Field	Details	Applicable Partner Type
Lead Status	<p>All new, inbound leads default to Submitted status. As you progress through the lead management lifecycle, choose from the following statuses as appropriate:</p> <ul style="list-style-type: none"> ○ Partner – Accepted ○ Partner – Rejected ○ Customer Cancelled: [NEW] <i>Informing UKG that rev share will no longer be projected.</i> <p>If a lead is rejected, provide a reason using the “Rejected Reason” drop-down.</p>	All Partners
Deal Status	<p>The deal status will aid UKG Sales representatives in identifying how and when to follow up with the prospective customer. As you progress through the sales cycle, select one of the following options:</p> <ul style="list-style-type: none"> ○ Initial Contact Stage ○ Discovery Call Complete ○ Demo Stage ○ Deferred by Customer ○ Closed – Lost ○ Closed – Won <p>If the lead is Closed – Lost, provide a reason using the “Closed - Lost Reason” drop-down.</p>	All Partners
Partner Deal Value	<p>The partner deal value is required for closed-won deals.</p> <p>When a deal is closed-won, enter and update the anticipated Annual Recurring Revenue (ARR) for the lead. Note: Closed – Won leads submitted by UKG resources, for \$5,000 or more, are eligible for SPIF payments. This field is required for a SPIF payment to be processed.</p>	Technology Partners
Invoice Date	<p>Future state: the Invoice Date will be required for closed-won deals.</p> <p>For Closed – Won leads, enter the estimated date for payment from the customer. This is required for calculating revenue share payments.</p>	Technology Partners

See below to find these key fields under the details section of the specific lead in the screenshot:

The screenshot displays the UKG Community interface for a lead record. The top navigation bar includes 'UKG Community', 'Home', 'Learn', 'Services & Support', 'Lead Management', and 'More'. A search bar and user profile are also visible. The lead record is titled 'Partner - Accepted' and is viewed in the 'Details' tab. The record is organized into two columns of fields, each with an edit icon. The following fields are highlighted with yellow arrows:

- Lead Status: Partner - Accepted
- Deal Status: Closed - Won
- Partner Deal Value: USD 13.00
- Invoice Date

Other visible fields include Partner Name (HireRight), Partner Service (Screening / Background Checking), Contact First (UKG Resource), UKG Email, UKG Phone, Company (BURBERRY LIMITED), Website, Name (Paisley Wight), Job Title, Testing Leads, Phone ((123) 123-1234), Email (paisley@test.com), No. of Employees (6,000), Number of Countries, Comments (Testing HireRight), Prime Service, and Address (444 MADISON AVE FL 14, NEW YORK, NY 10022).

Note:

You can easily export your leads from the report view into an Excel file or CSV for convenient sharing or viewing. Simply click 'Export', configure your settings, and then download the file.

Additional Features within a Lead

To enhance collaboration with UKG resources on a specific lead record, use the Chatter functionality. Within an individual lead record, click on the "Feed" tab at the top, then select "Share an update."

This will enable you to post additional information and tag UKG resources or other members of the UKG Community.

The screenshot shows the 'Feed' tab interface for a lead record. It features a 'Post' button and a 'Question' button. Below these is a large text input field with the placeholder text 'Share an update...'. To the right of the input field is a 'Share' button.

You may also upload images, PDFs, or other attachments and view Lead History through the “Related” tab at the top of the lead record. Please note: these resources will be viewable by internal UKG resources as well.

Details Feed **Related**

Open Activities (0)

Activity History (0)

Notes (0)

Lead History (2)

Date	Field	User	Original Value	New Value
9/25/2024 5:19 PM	Created.	Libbie Wight, UKG		
9/25/2024 5:19 PM	Owner (Assignment)	Libbie Wight, UKG	Libbie Wight	Partner Lead Queue

[View All](#)

Notes & Attachments (0) [Upload Files](#)

[Upload Files](#)

Or drop files

Submit a Lead to UKG

As part of the lead management functionality, you can send leads to the UKG Sales Team. Simply select “New Lead to UKG” in the UKG Community Lead Management landing page.

The screenshot shows the 'Create a Lead' form in the UKG Community interface. The form is titled 'Create a Lead' and includes a sub-header: 'Send a lead to the UKG Sales Team. If the lead is valid (i.e., not a duplicate lead, free of any errors, etc.), it will be available to view in the 'My Outbound Leads' report within 24 hours.'

The form fields are as follows:

- * First Name: [Text Input]
- * Last Name: [Text Input]
- * Company Name: [Text Input]
- * Job Title: [Text Input]
- * Business Phone: [Text Input]
- * Email Address: [Text Input]
- * Address 1: [Text Input]
- Address 2: [Text Input]
- * City: [Text Input]
- * Country: [Dropdown Menu: Select Country]
- * Zip Code: [Text Input]
- Does your company plan to upgrade or replace its current human resource and/or payroll system? If so, when? [Dropdown Menu: -- Please Select --]

Once a lead is submitted and verified as valid (i.e., it is unique and error-free), it will appear in the My Outbound Leads report within 24 hours. In the Outbound Lead Report, ***please note that leads to UKG should not be edited once submitted.***

The screenshot shows the 'My Outbound Leads' report in the UKG Community interface. The report is titled 'My Outbound Leads' and includes a sub-header: 'Review and track leads you've sent to UKG sales.'

The report includes a 'Report: Leads' section with a 'My Outbound Leads' title and an 'Enable Field Editing' button. Below this, the 'Total Records' is 2.

	Create Date	Company / Account	First Name	Last Name	Lead Status	Associated Opportunity Details
1	8/16/2024	ABC Corp	John	Doe	Converted	Associated Opportunity Name = BURBERRY LIMITED Sales Stage = 0 - Qualification Expected Close Date = 2024-08-16
2	8/16/2024	Future Tech	Jessica	Taylor	New	

For more details on a specific lead, simply click on it to view its full profile.

Lead
John Doe

+ Follow

Company
ABC Corp

Lead Owner
North America Unassigned Leads ²

Lead Status
Converted

Address
123 E Main St
Cumming, GA 30040
USA

>

New

BDR Engaged

Sales Rep Engaged

BDR Extending Cadence

Push to Outreach

Details
Feed
Related

Key Lead Information:

<small>Company</small> ABC Corp ✎	<small>Lead Status</small> Converted ✎
<small>Name</small> John Doe ✎	<small>Rejection Reason</small> ✎
<small>Job Title</small> Manager ✎	<small>Activity Status</small> New
<small>Phone</small> 123-456-7890 ✎	<small>Rating</small>
<small>Mobile</small>	
<small>Email</small> john.doe1-aug15@test.com ✎	

Lead Qualification:

Purchase Timeframe
No plans to evaluate

Best Practices

To summarize this guide, you should now have a good understanding of how to manage inbound and outbound leads, leverage resources, and more. Here are some best practices to keep in mind as you continue to manage leads:

- **Ensure Proper Access:** Make sure your stakeholders have the right access. Access begins with the UKG community but extending that access to Lead Management requires a separate request.
- **Regularly Update Lead Information:** Review and update lead information at least monthly. Outdated information can hinder our program's performance.
- **Track Statuses and Key Fields:** Ensure accuracy by tracking statuses and focusing on key fields that need to be edited.
- **Seek Further Support:** For additional support on the lead management lifecycle, reach out to partners.leads@ukg.com.

Remember, this piece of the puzzle is crucial for your overall success and to support additional programs that enhance your value, business growth, and our collective overall success.