UKG Partner Lead Management

External Guide

Contents

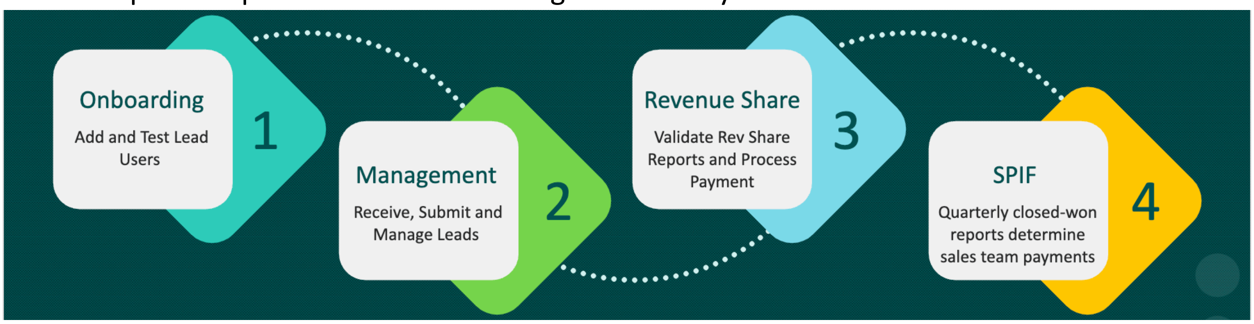
Introduction

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.

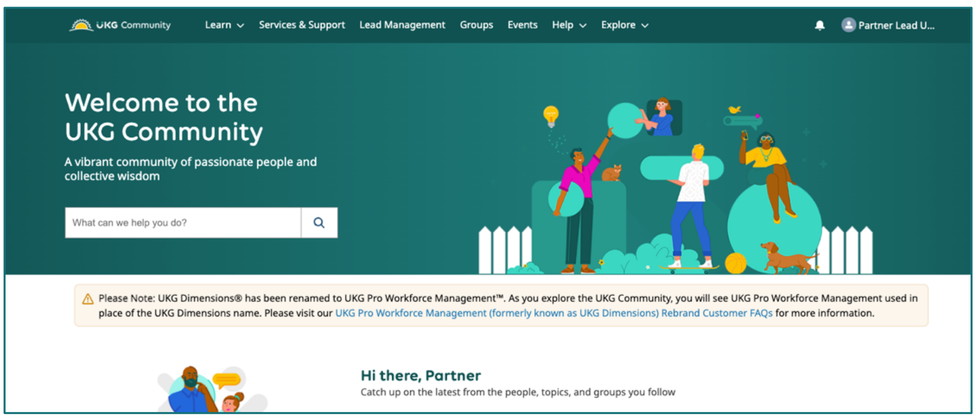
Procedure

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

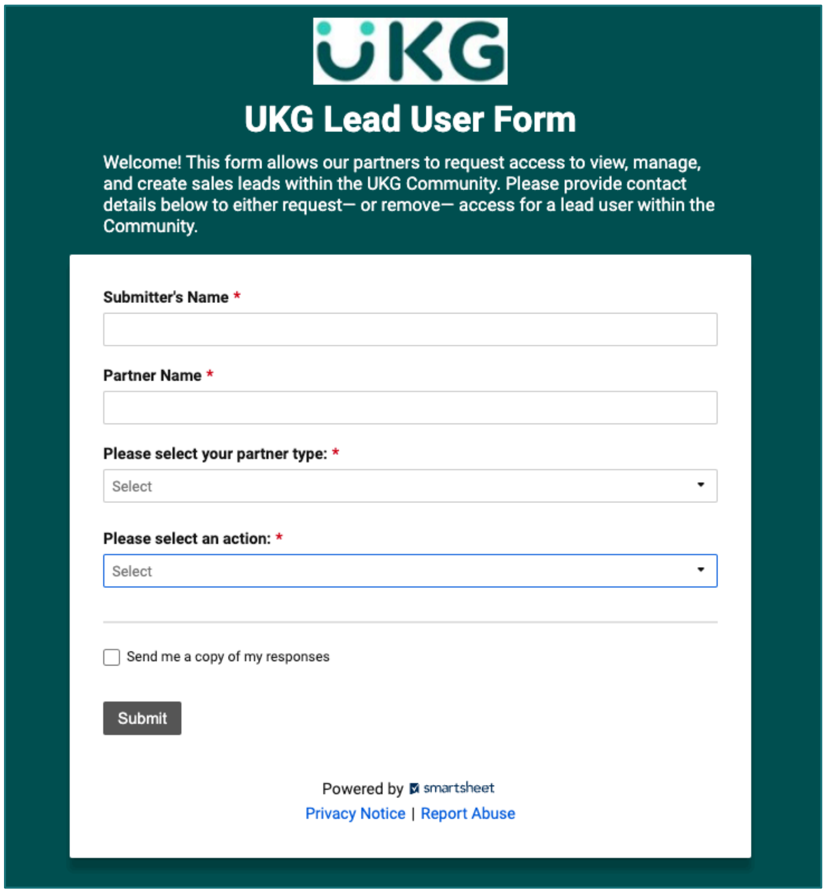
The access request process is initiated during the onboarding phase. At this stage, you will be introduced to your UKG Lead Program Manager, who will provide you with a form to complete. This form is necessary to request partner access and to enable users within Lead Management.

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

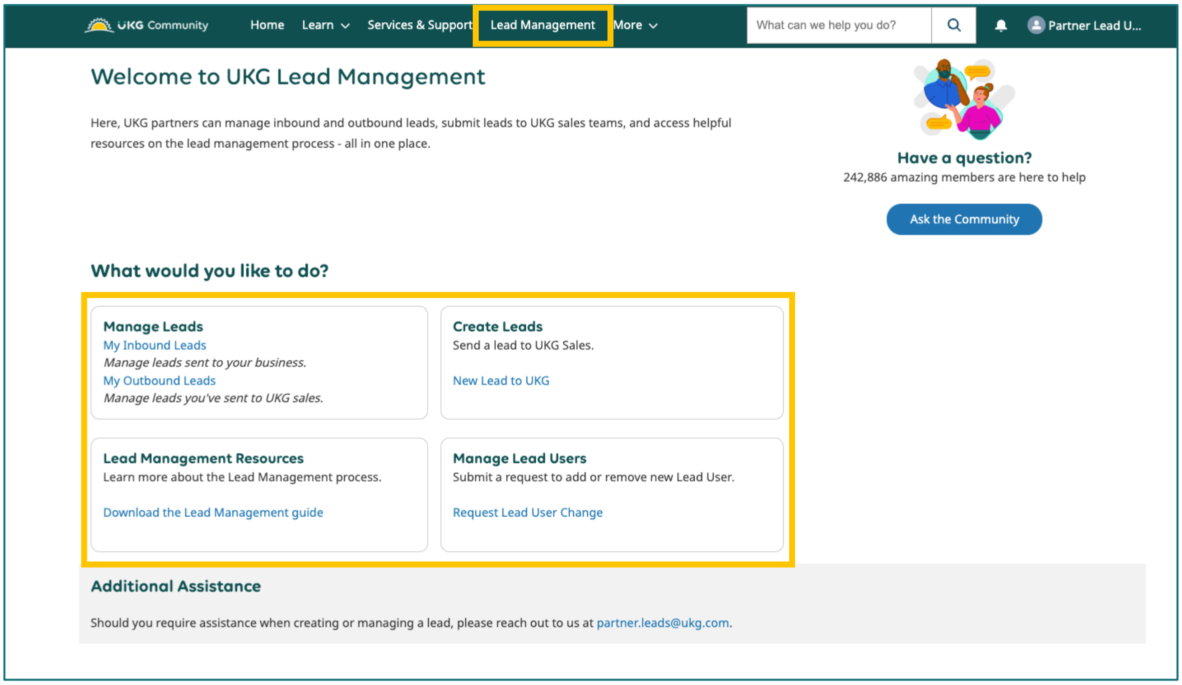
Submit

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.



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:

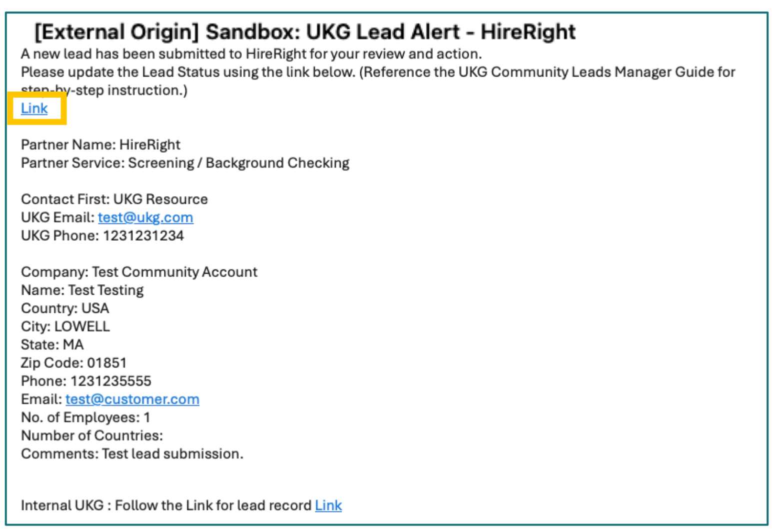
Lead Source	Submitted By	Submitted To
UKG Salesforce	UKG resources	Partners
UKG Marketplace	UKG resources Customers Prospects	Partners
UKG Community	Partners	UKG Sales

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.

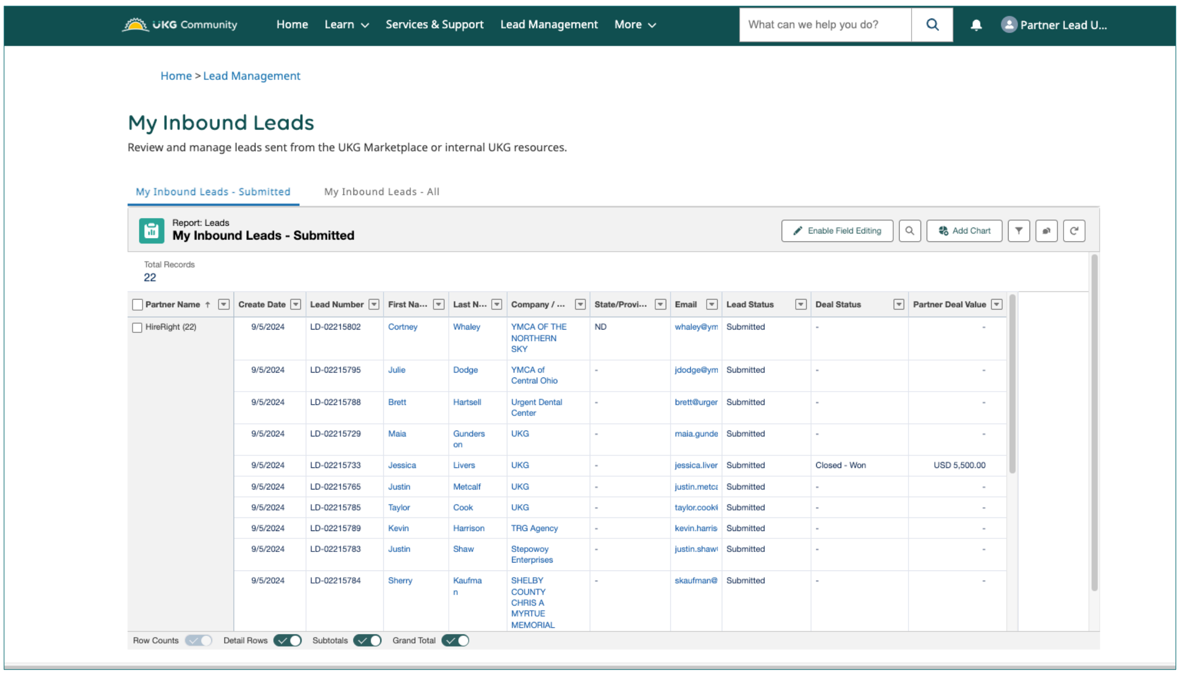
Internal UKG : Follow the Link for lead record Link

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.



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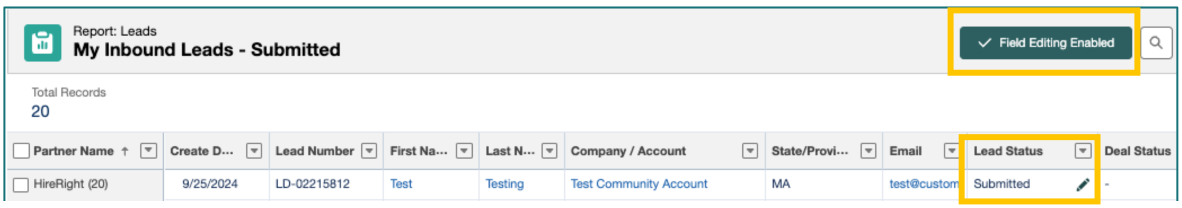
3. How to Edit Lead Information

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:

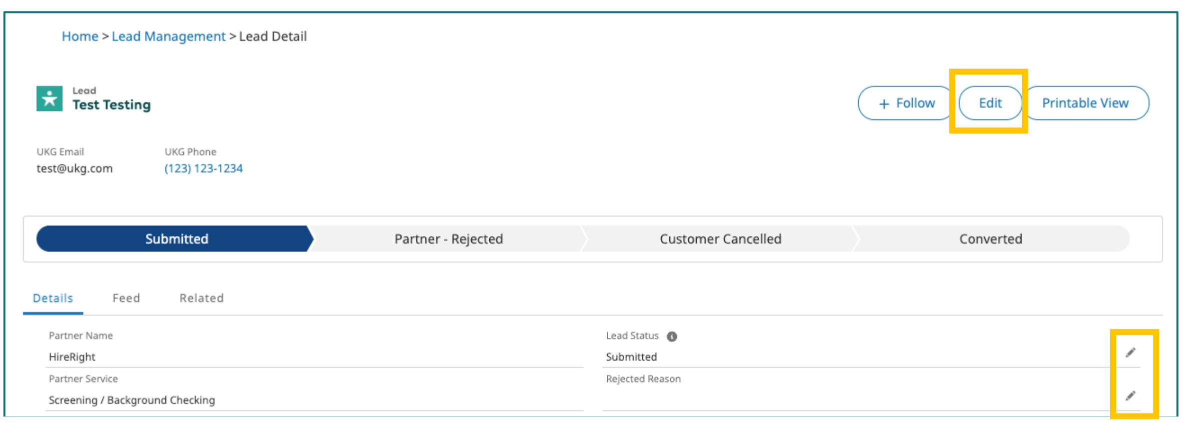
Inline Editing in Reports

- 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.



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.

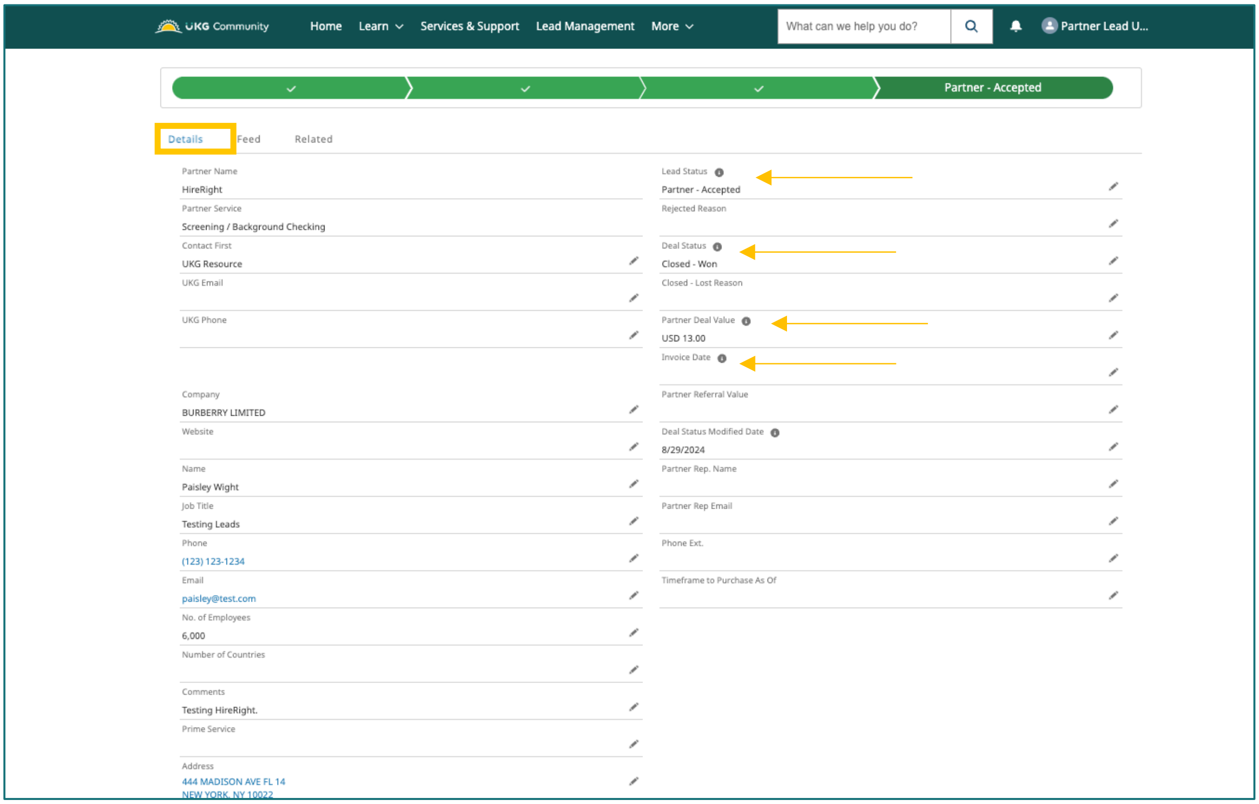


4. Key Fields to Edit

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	All new, inbound leads default to Submitted status. As you progress through the lead management lifecycle, choose from the following statuses as appropriate: ○ Partner – Accepted ○ Partner – Rejected ○ Customer Cancelled: ***[NEW]*** *Informing UKG that rev share will no longer be projected.* If a lead is rejected, provide a reason using the "Rejected Reason" drop-down.	All Partners
Deal Status	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: ○ Initial Contact Stage ○ Discovery Call Complete ○ Demo Stage ○ Deferred by Customer ○ Closed – Lost ○ Closed – Won If the lead is Closed – Lost, provide a reason using the "Closed - Lost Reason" drop-down.	All Partners
Partner Deal Value	**The partner deal value is required for closed-won deals.** 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.	Technology Partners
Invoice Date	**Future state: the Invoice Date will be required for closed-won deals.** For Closed – Won leads, enter the estimated date for payment from the customer. This is required for calculating revenue share payments.	Technology Partners

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

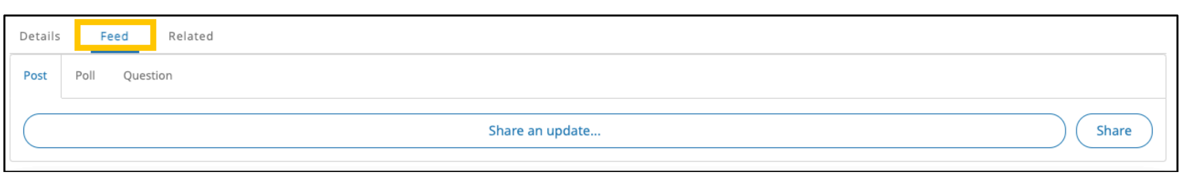


<u>Note:</u>
You can easily export your leads from the report view into an Excel file or CSV for convenient sharing or viewing. Simply click ‘Export’, configure your settings, and then download the file.

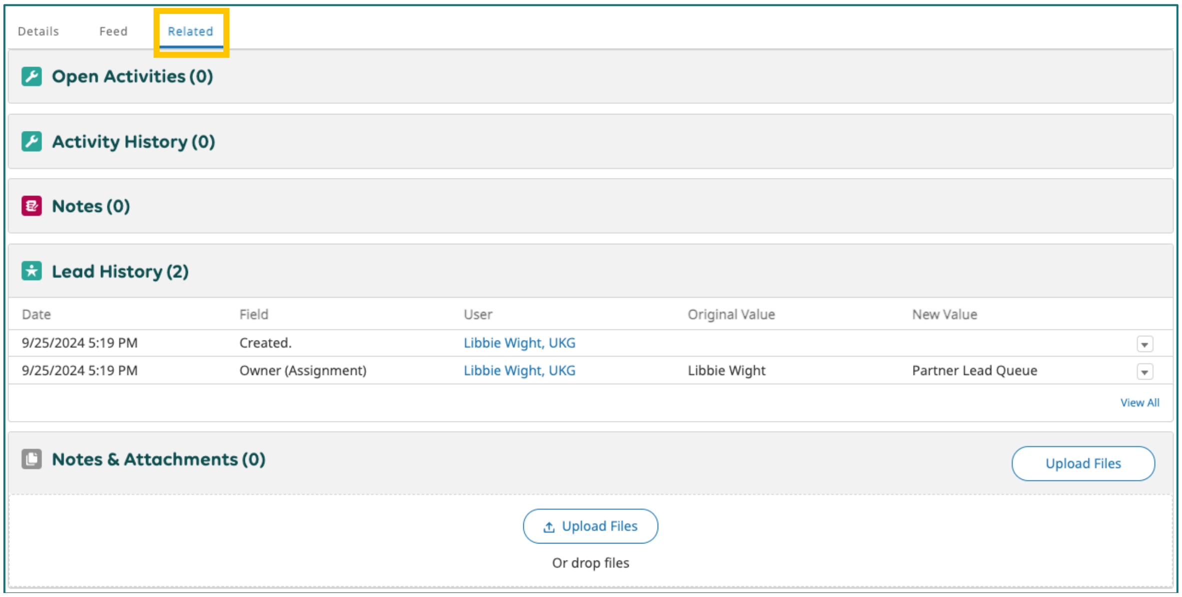
Additional Features within a Lead

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.

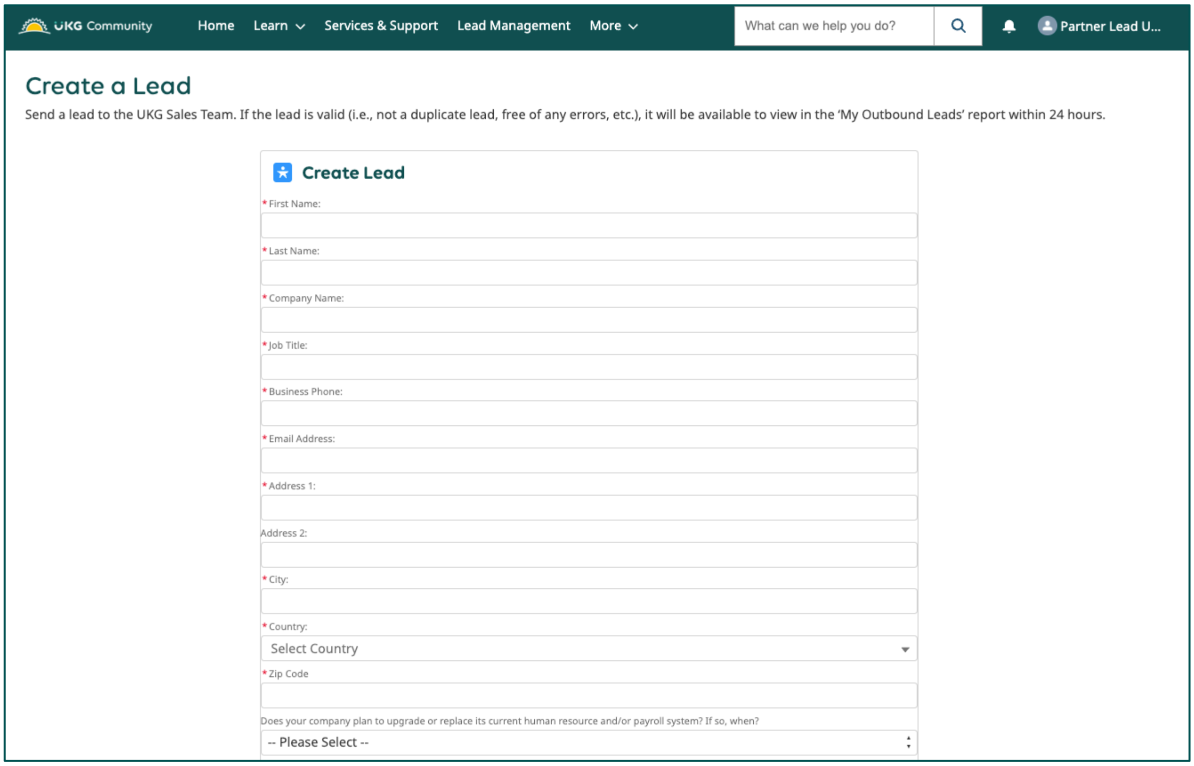


You may also upload images, PDFs, or other attachments and view Lead History through the “Related” tab at the top of the lead record. Please note: these resources will be viewable by internal UKG resources as well.

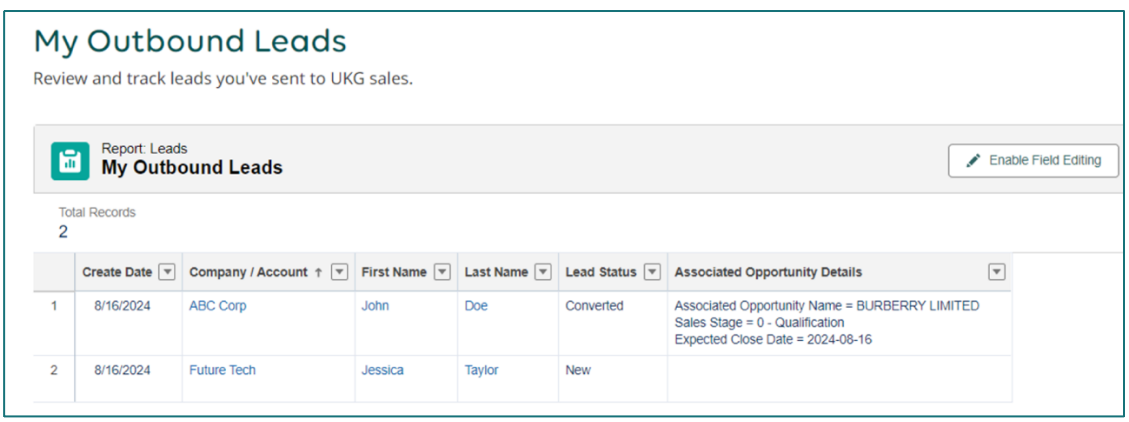


Submit a Lead to UKG

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.



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.***


My Outbound Leads

Review and track leads you've sent to UKG sales.

Report: Leads

My Outbound Leads

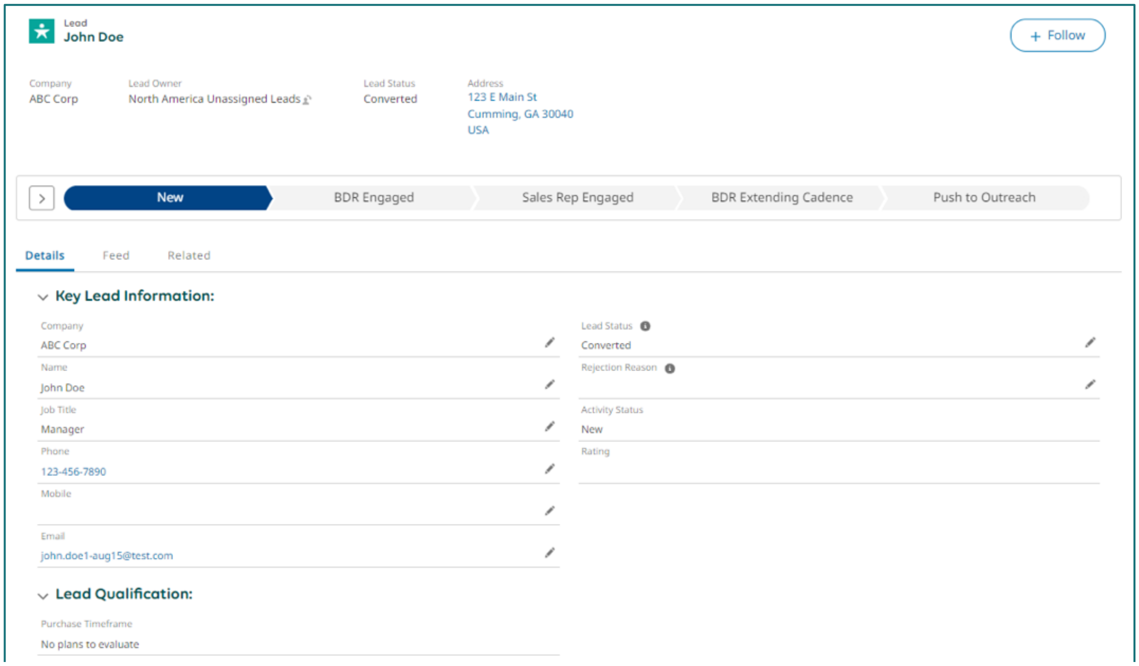
Enable Field Editing

Total Records

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