Advantage Sales & Channels Qualification Process

Qualifying a lead to be sent to Advantage Sales or Channels can require evaluating several areas around their fax usage. A lead may fall below a certain fax volume threshold but be the perfect vertical for Advantage Sales or Channels. You will need to look at how leads have historically been assigned as well as make your best determination based on the information submitted by a lead.

**Fax Volume**

* Qualified:
  + Daily: > 100
  + Monthly: >300
  + Quarterly: >750
* Disqualified:
  + Daily: < 100
  + Monthly: < 300
  + Quarterly: <750

**Fax Usage**

* Qualified
  + 20+ Fax Users
  + Required for Specific Software Integration
    - EMRs, MFPs, CRMs, ERPs, etc.
* Disqualified
  + Personal / Individual Use
  + I Don’t Know
* Additional Qualification Consideration Required
  + Specific Departmental Use

**Industry / Vertical**

* Qualified (Examples)
  + Enterprise
  + Large Hospital
  + Government
    - Military, County, State, etc.
  + University / Colleges
  + Healthcare Services
  + Legal
  + Financial Services
  + Transportation
  + Manufacturing
* Disqualified (Examples)
  + Personal / Branch Office
    - E.g. Joe Smith’s
  + Individual / Sole Employer Businesses
    - E.g. Small retail stores, small business services (CPA, Data Processor, etc)
  + State Farm / All State / National Insurance Agency with Single Agent requesting system
    - These leads are generally not suitable for RightFax as they are primarily looking to join the main business account and not purchase a system for themselves.
    - To disqualify these leads, please reference the [SOP – Disqualifying State Farm / AllState Leads](https://atnystore01.blob.core.windows.net/webfiles/internal/SOP_Disqualifying_State_Farm_AllState_Leads.docx)
* Additional Qualification Required
  + Vertical / Business Name / Website unclear