

Leads

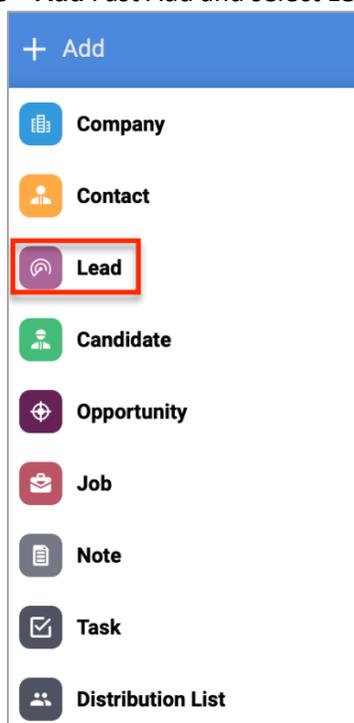
In Bullhorn, a Lead is a person with whom you are not currently working, and for whom you do not have enough information to create a full record. A Lead could be a potential Contact at a new Company that you met at a networking event, or a possible Candidate who was referred to you by someone you have worked with previously.

A Lead can also be a person with an existing Company you work with. For example, if you work with the Company on Industrial position but not IT, the head of IT could be a Lead.

You can enter Notes and track activity for the Lead. A Lead move through a Qualifying process and is either converted to an active Contact (or Candidate if using Leads for Candidate) or Closed as not viable.

Creating a Lead

To create a Lead in Bullhorn, click the + **Add** Fast Add and select **Lead**.



The *Add Lead* page opens, populate all required fields, and add as many additional details as possible.

- Use **New Company** if the Company this person works for is not in Bullhorn. If the Company is in Bullhorn, select it in **Existing Company**.
- If an existing Contact referred the lead or can help you with the lead, select the Contact in **Associated Contact**

Once all Lead details have been populated, click **Save**.



The new Lead is created and is ready to be worked.

Managing a Lead

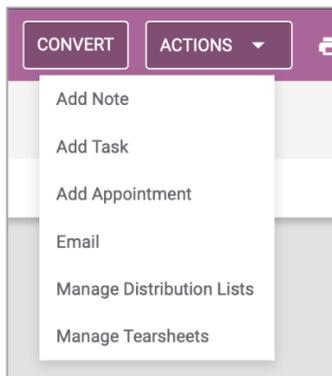
As information is gathered on the Lead, Click the **Edit** tab to add information and make updates. Click **Save** when complete.

The screenshot shows a 'New Lead' form with the following details:

- Header: 'New Lead' with a location pin icon.
- Form Fields: 'FIRST NAME' (value: 'New'), 'MIDDLE NAME', 'LAST NAME' (value: 'Lead'), 'NICKNAME', 'TITLE'.
- Navigation: 'OVERVIEW', 'EDIT' (highlighted), 'ACTIVITY', 'EMAILS', 'NOTES (0)'. 'EDIT' is highlighted with a red box.
- Footer: 'NEW COMPANY' link.

Use Notes, Tasks, Appointments, and other action items to track engagement with the Lead and capture activity. Add them to Tearsheets or a Distribution list as you work the Lead. Click the **Actions** dropdown and select an action.

- Based on the selection, the appropriate form appears. Complete the form (as in the Add Note example below) and click **Save**.

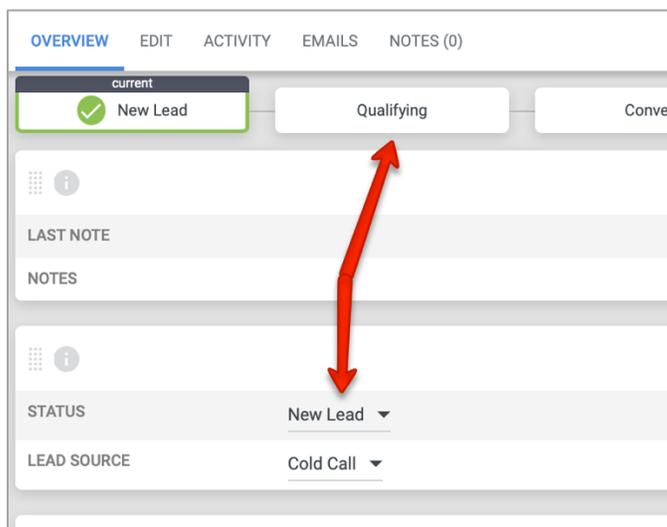


The screenshot shows the 'Add Note' form with the following details:

- Title: 'Add Note' with a close button.
- Dropdowns: 'NOTE TEMPLATE', 'DRAFTS (0)'. 'DRAFTS (0)' is highlighted.
- Section: 'COMMENTS'.
- Rich Text Editor: Includes a toolbar with 'Styles', 'Size', 'B', 'I', 'U', 'A', and a text area with the placeholder text: 'Enter your note text here. Reference people and distribution lists using @ (e.g. @John Smith). Reference other records using # (e.g. #Project Manager).'

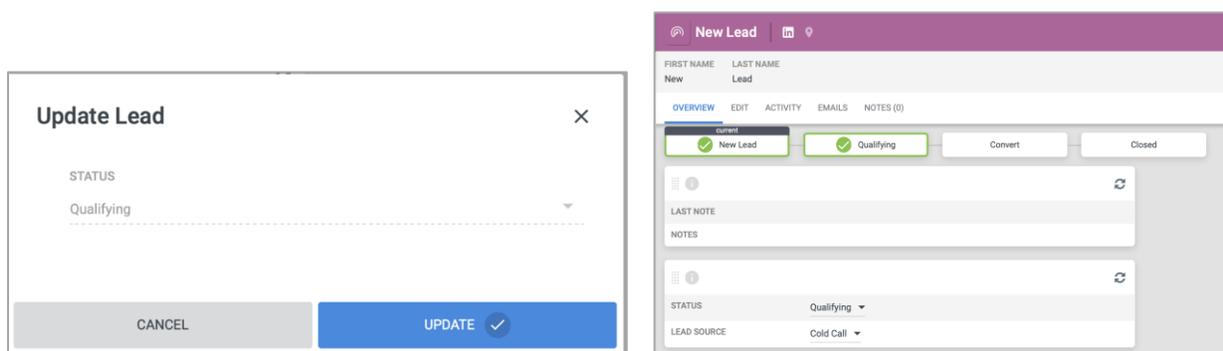
Qualifying, Converting, and Closing a Lead

As a Lead is worked, move it into the Qualifying status. Click the the *Qualifying* workflow item, or directly update the Status (from Overview or Edit tab).

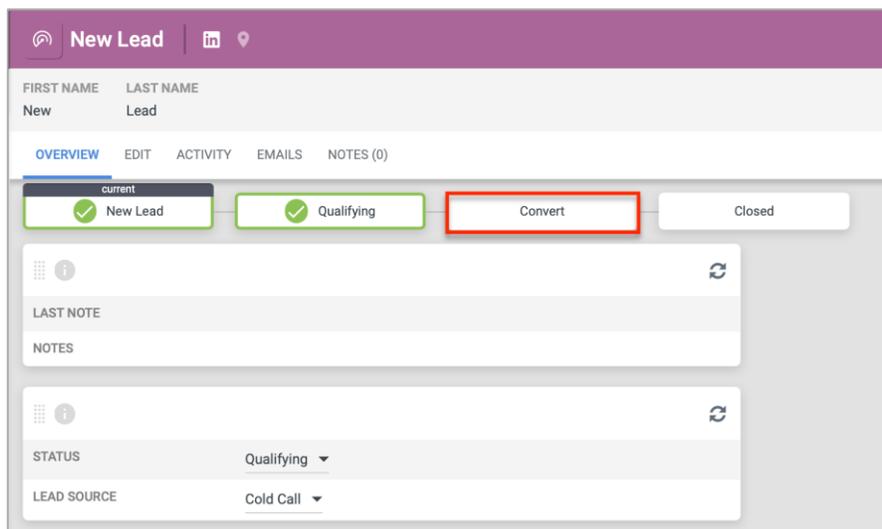


When using *Qualifying* from the workflow, the *Update Lead* box appears. Click **Update**.

- Once the status is updated, the *Qualifying* workflow icon updates indicating the step is complete

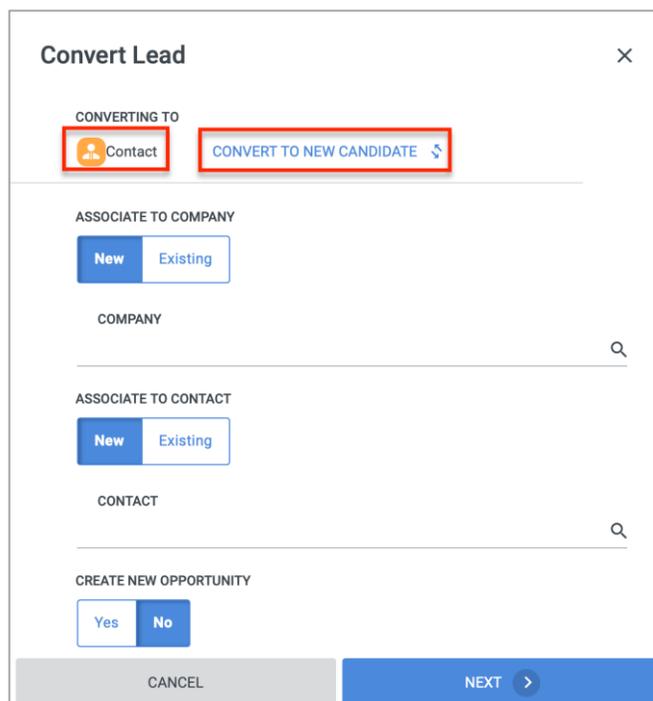


When the Lead turns into a solid Contact (or Candidate), click the **Convert** workflow step to begin the process.



The *Convert Lead* box appears. The option to convert into a **Contact** always appears.

- If your environment is configured to convert to a candidate, the option for a **Candidate** will appear depending on entitlements. Select the appropriate option.
- If necessary, update the fields to associate the Contact to an Existing Company or Contact.
- For a New Contact and New Company, converting the Lead creates both a Company and Contact record



For a new Contact and New Company, **Add Company** appears first. The form is prepopulated with relevant information from the Lead.

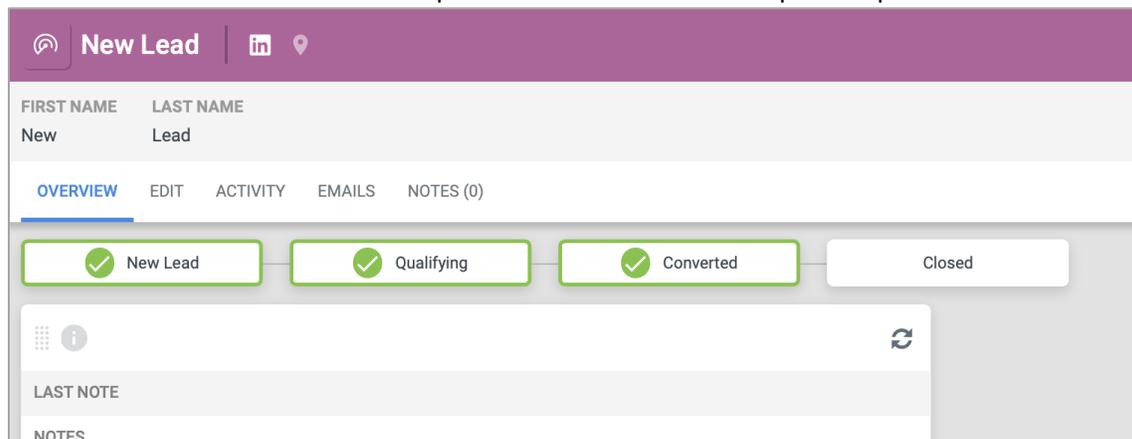
- Complete the required fields and include any other known information. Click **Save** to advance to **Add Contact**

Add Contact appears next. The form is prepopulated with relevant information from the Lead.

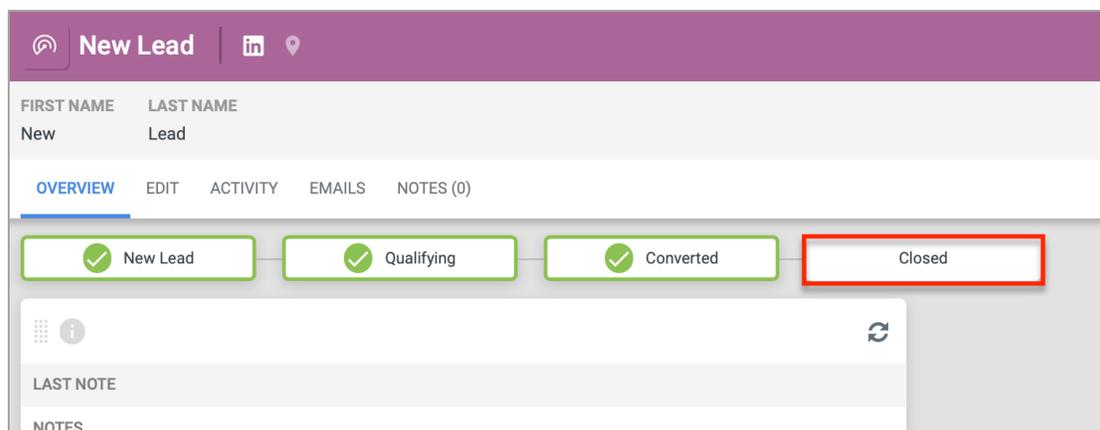
- Complete the required fields and include any other known information. Click **Save** to complete the conversion

Once the converted entity is created, the screen returns to the Lead record.

- The *Converted* workflow items updates to reflect that this step is complete.



Since no further action is needed on the Lead record, close it. Click the *Closed* workflow icon (or update the Status directly)



The *Update Lead* box appears and displays the status as *Closed*. Click **Update** to close the Lead.

Update Lead

STATUS

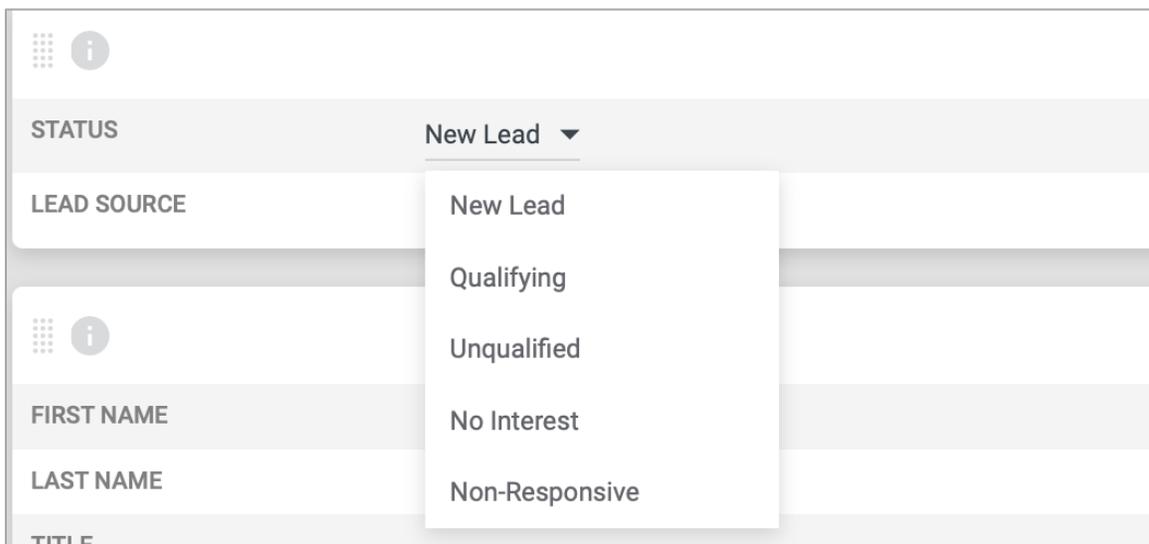
Closed

CANCEL UPDATE ✓

When a Lead is not converted

If the Lead does not become a viable Contact (or Candidate) and no further activity will occur with this Lead, close the Lead.

- Select the appropriate close status: Unqualified, No Interest, or Non-Responsive. (Status options may vary in your environment.)
- Take this step only when a lead is not converted.



The screenshot shows a CRM interface for a lead record. The lead is currently in the 'New Lead' status. A dropdown menu is open, showing the following options: 'New Lead', 'Qualifying', 'Unqualified', 'No Interest', and 'Non-Responsive'. The lead record fields visible are: STATUS (New Lead), LEAD SOURCE, FIRST NAME, LAST NAME, and TITLE. There are also information icons (i) next to the status and first name fields.