Leads

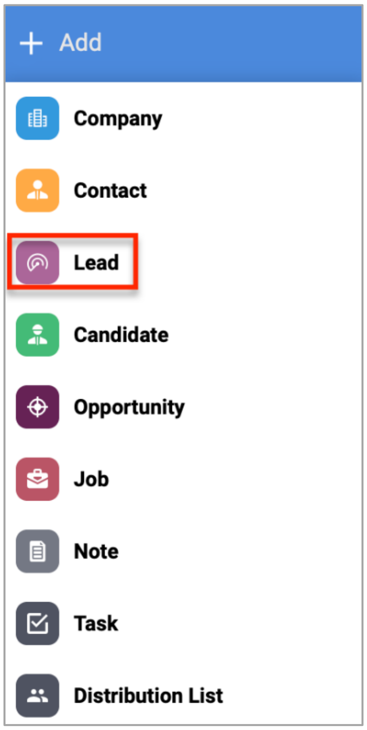
In Bullhorn, a Lead is a person with whom you are not currently working, and for whom you do not have enough information to create a full record. A Lead could be a potential Contact at a new Company that you met at a networking event, or a possible Candidate who was referred to you by someone you have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

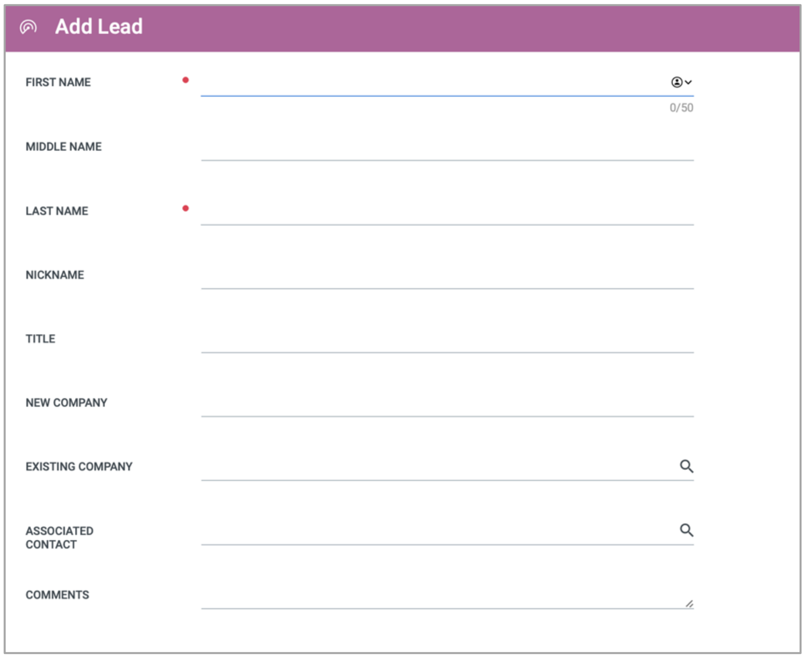
Creating a Lead

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



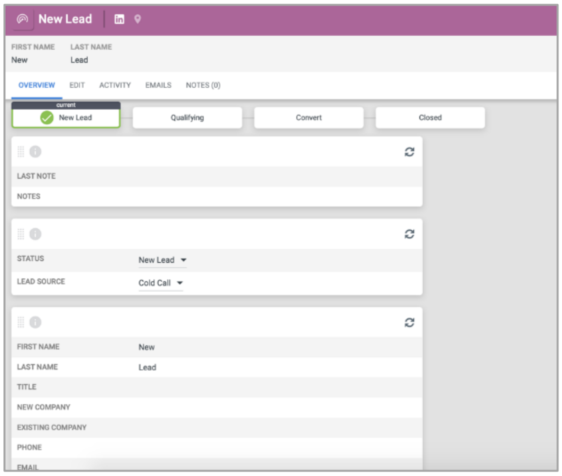
The *Add Lead* page opens, populate all required fields, and add as many additional details as possible.

- 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**



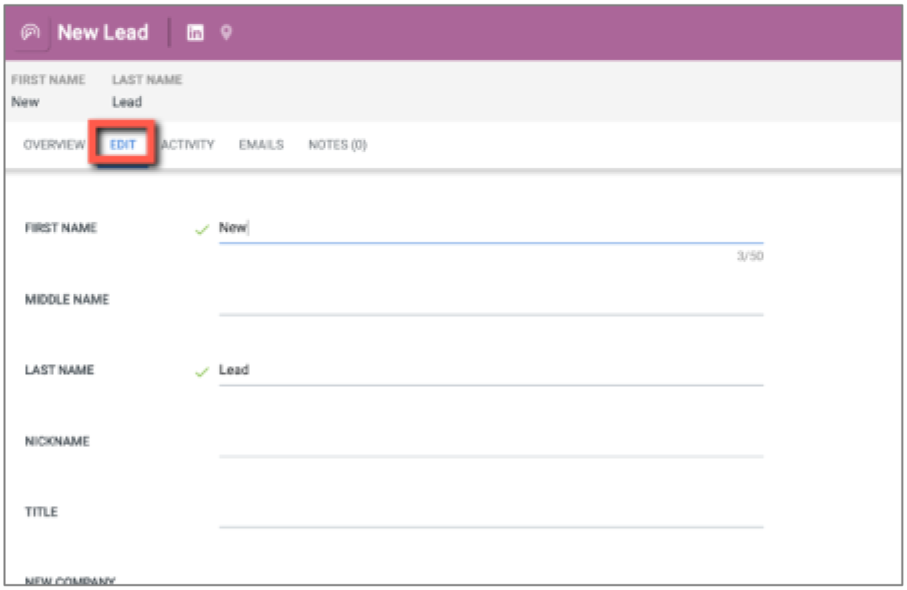
Once all Lead details have been populated, click **Save**.

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



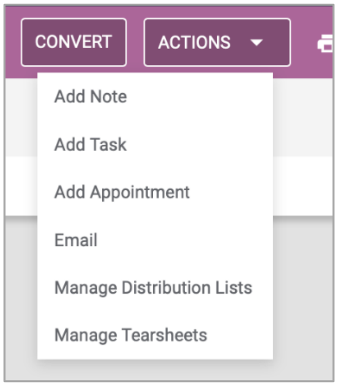
Managing a Lead

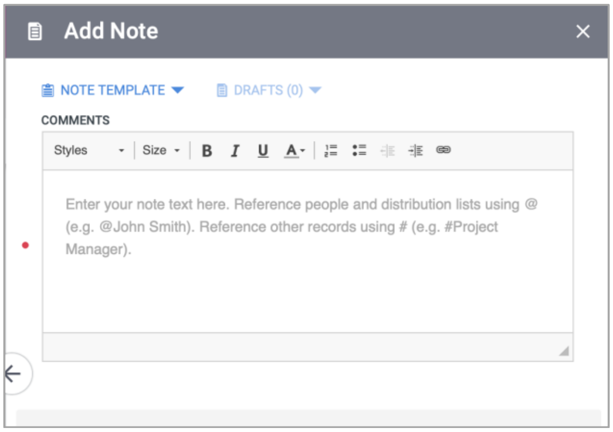
As information is gathered on the Lead, Click the **Edit** tab to add information and make updates. Click **Save** when complete.



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.

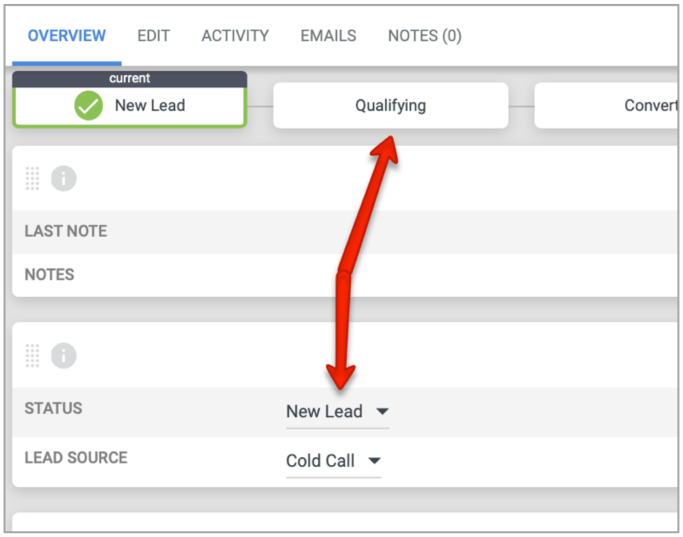
- Based on the selection, the appropriate form appears. Complete the form (as in the Add Note example below) and click **Save.**





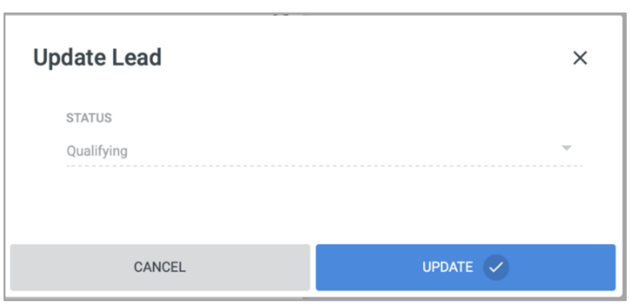
Qualifying, Converting, and Closing a Lead

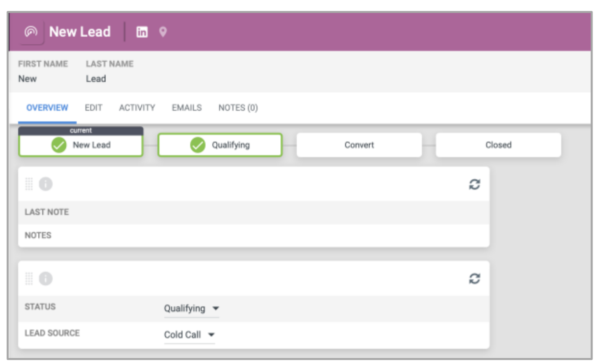
As a Lead is worked, move it into the Qualifying status. Click the the *Qualifying* workflow item, or directly update the Status (from Overview or Edit tab).



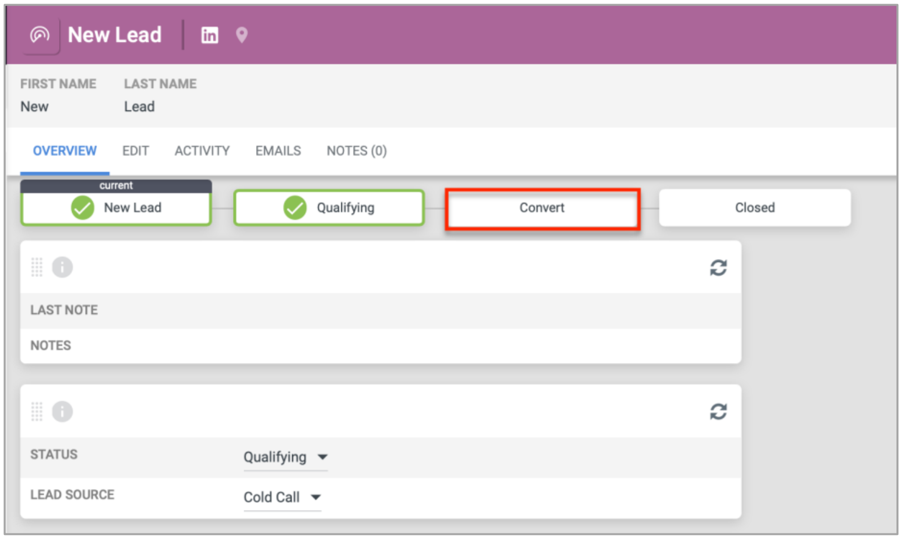
When using *Qualifying* from the workflow, the *Update Lead* box appears. Click **Update.**

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



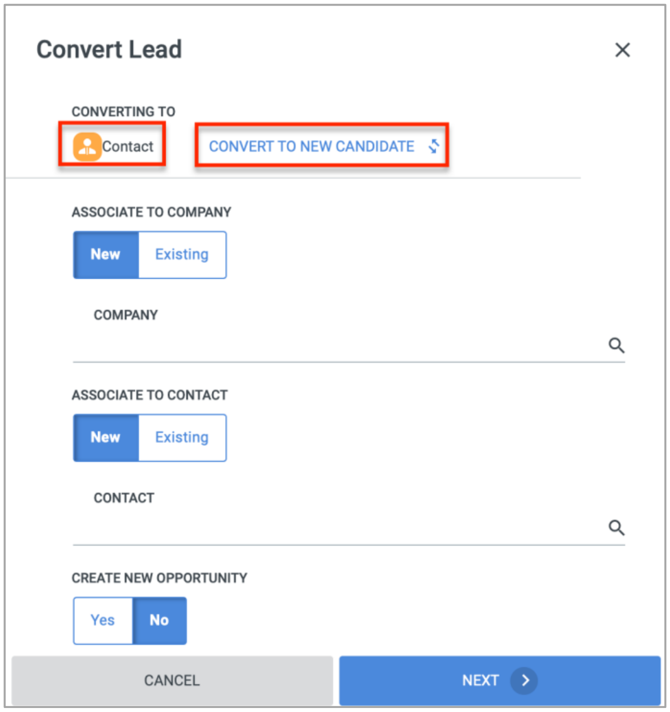


When the Lead turns into a solid Contact (or Candidate), click the **Convert** workflow step to begin the process.



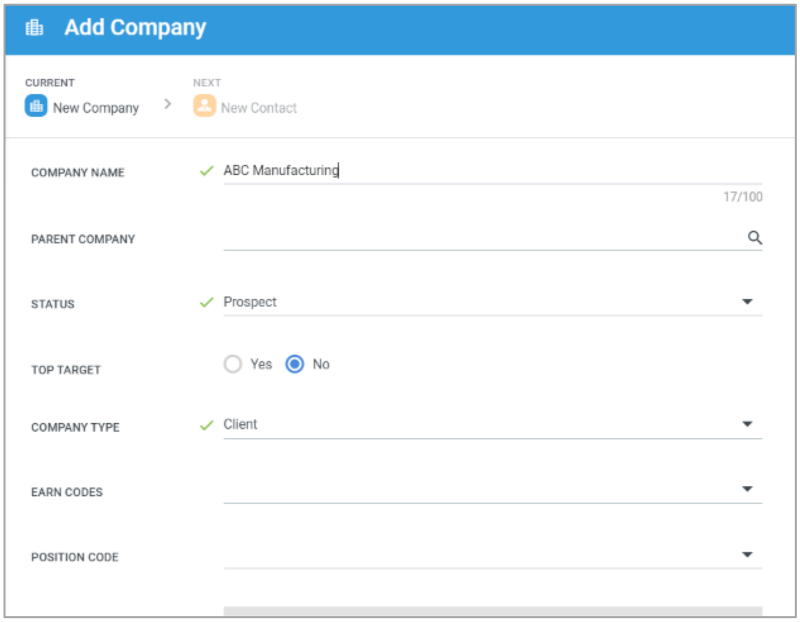
The *Convert Lead* box appears. The option to convert into a **Contact** always appears.

- 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



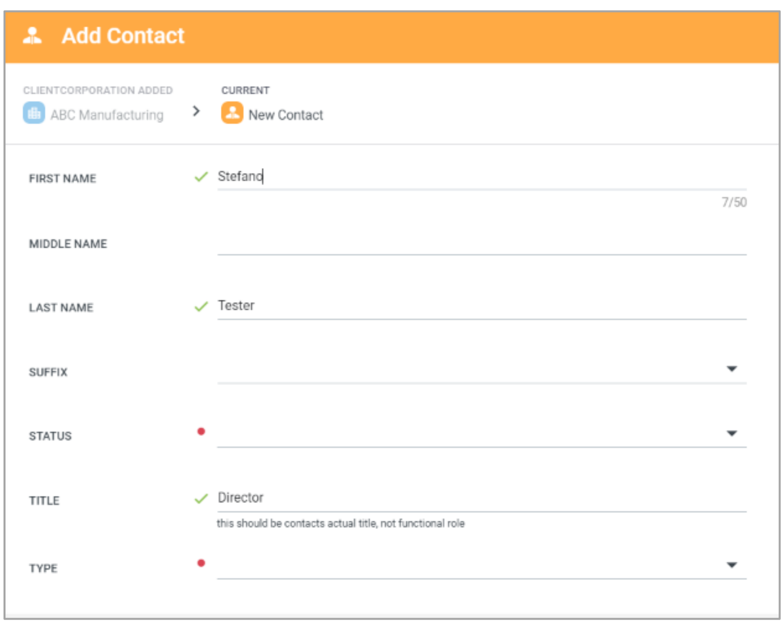
For a new Contact and New Company, **Add Company** appears first. The form is prepopulated with relevant information from the Lead.

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



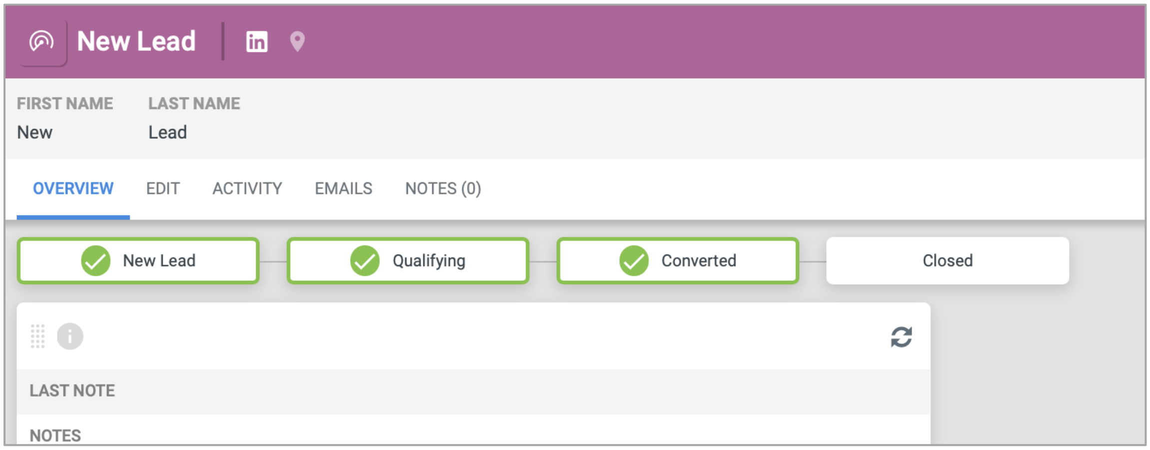
Add Contact appears next. The form is prepopulated with relevant information from the Lead.

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

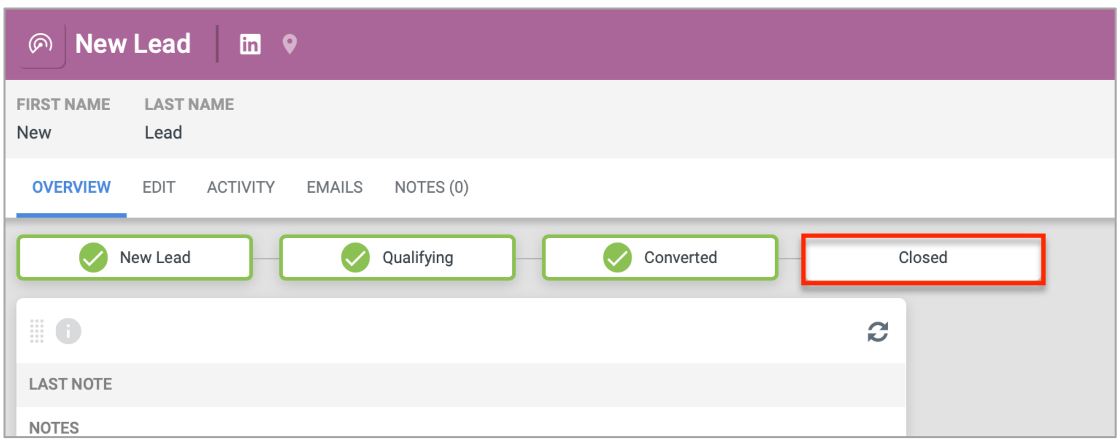


Once the converted entity is created, the screen returns to the Lead record.

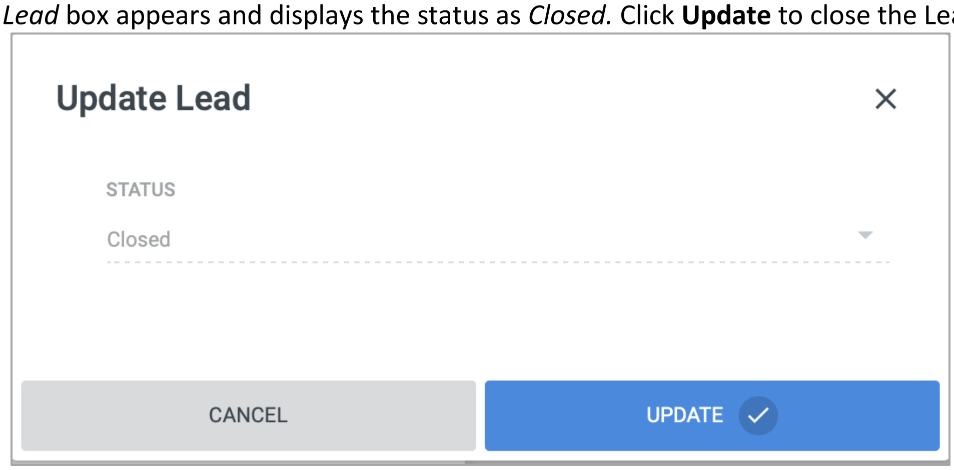
- The *Converted* workflow items updates to reflect that this step is complete.



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**.**



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.