

# Lead Assignment Process for Residential and Small Commercial

## Wiki Overview

- **Wiki purpose:** establish one source of truth for how we assign leads at Bright to incentive proper care and conversion of leads we buy
- **Validity:** Valid until December 31st 2024
- **Wiki owner:** @Jonah Greenberger

## Lead Assignment Philosophy

**Summary:** assign more leads to top converters and fewer to lower converters such that:

- Higher converters are able to be paid more
- Lower converters are incentivized to focus on existing deals before getting new ones to ensure we take care of all customers the best we can

## For Sales Development Reps

- **Top SDR Performers:**
  - Top performers are defined as:
    - Residential:
      - >100% of the CR depending on the tier of each SDR in the GTM and
      - >66 RSVs per month
    - Commercial:
      - >100% of the CR depending on the tier of each SDR in the GTM and
      - >50 RSV per month
  - Top performers will aim to get 188 web SQLs per month in residential and 181 web SQLs per month in PBDT
  - Top performers cannot have more than 1 unassigned RSV per month (RSVs get unassigned due to not complying with our [RSV criteria](#))
- **Medium SDR Performer:**
  - Medium performers are defined as:
    - Residential:
      - 100%-80% of the CR depending on the tier of each SDR in the GTM and
      - 66-53 RSVs per month
    - Commercial:
      - 100%-80% of the CR depending on the tier of each SDR in the GTM and
      - 50-40 RSV for PBDT

- Medium performers will aim to get ~140 web SQLs per month. Note this equates to only 75% of the RSV goal so the remaining 25% of the monthly RSV goal should come from Zombies from Sales, NOPs, and Recovery SQLs.
- Medium performers cannot get more than 4 RSVs unassigned per month due to not complying with our [RSV criteria](#)
- **Low SDR Performer/Pausing Leads:**
  - Low performers are defined as having
    - Residential:
      - Less than 80% of the CR depending on the tier of each SDR in the GTM and
      - <53 RSVs per month
    - Commercial:
      - Less than 80% of the CR depending on the tier of each SDR in the GTM and
      - <40 RSVs over trailing 30 days
  - For low performers, we pause new lead assignments until they become medium performers.
  - Low performers are also any SDRs that has 5 or more unassigned RSVs in a given month. If an SDR falls into this category, the SDR manager will follow up with the Bright [Direct Sales](#)"
- **Performance Rules**
  - Any paid vacation should be deferred until the SDR is back to at least a medium performer
- **Notes:**
  - The lead has received three or more contact attempts without a response.
  - The lead has explicitly requested communication outside of regular working hours.
  - The lead has registered outside of working hours, and the SDR can establish contact within the initial 15 minutes following registration.
  - If we have more SQL than sales reps can handle in a given week, we should delay focus on recovery/zombie leads
  - If an SDR can't contact the new channel leads for a period of more than 1 hour due to a personal emergency, leads will be paused during that period of time to avoid having leads unattended
  - An SDR may initiate contact with a lead outside of standard working hours (9 am to 6 pm) under the following circumstances:
    -

## Direct sales: For Resi and Small Commercial Sales Reps

### Sales Reps Residential

Expected conversion rates and monthly approved projects quota for Residential

	CR web RSV - APP	CR all sources RSV - WC	Approved projects quota
month 1	0%	0%	1
month 2	12%	16%	3
month 3	12%	16%	4
month 4	15%	16%	5
month 5	15%	16%	6
month 6	16%	18%	8

## Notes:

- Conversion rates measured over the trailing 90 days.
- All Sales Reps must have at least one referral-approved every month.

## Sales Reps Small Commercial

Expected conversion rates and monthly approved projects quota for Small Commercial

	CR web RSV - APP	CR all sources RSV - WC	Approved projects quota
month 1	0%	0%	0
month 2	10%	12%	2
month 3	11%	13%	3
month 4	13%	15%	4
month 5	13%	15%	4
month 6	13%	15%	5

## Notes:

- Conversion rates achieved over the last 120 days.
- All Sales Reps must have at least one referral-approved project per month.

- **Top Sales Rep Performers:**

- Top performers for Residential and Small Commercial are defined as those that achieve => 95% in all of the goals in the tables above.
- Rules:
  - Aim to get 32 new RSVs for the following month. **This is an estimate, it will depend on month volume.**
  - [Additional potential benefit suggestion: you qualify to get help scheduling Welcome Calls from the customer ops team]
- Constraints:
  - no more than 15 RSVs per week and 4 per day (**Will depend on month cadence**)
  - NOP (no offer presented) block: Energy experts with a NOP greater than 20% (*from the total amount of ASVs their plan needs*) will be held responsible for the following NOPs and will need to reschedule them until their percentage drops to less than 20%. The SDRs will not be owners of rescheduling those NOPs. NOPs exceeding 20% will not be unassigned until the end of the month.
- US Reference numbers:

- **Medium Sales Rep Performers:**

- Medium performers for Residential and Small Commercial are defined as those that achieve => 80% to < 95% in all of the goals in the tables above.
- Rules:
  - Medium performers will aim to get 24 new RSVs assigned for the subsequent month. **This is an estimated, it will depend on month volume.**
- Constraints:
  - no more than 10 RSVs per week and 3 per day (**Will depend on month cadence**)
  - NOP (no offer presented) block: Energy experts with a NOP greater than 20% (from the total amount of ASVs their plan needs) will be held responsible for the following NOPs and will need to reschedule them until their percentage drops to less than 20%. The SDRs will not be owners of rescheduling those NOPs. NOPs exceeding 20% will not be unassigned until the end of the month.
- US Reference numbers:

...

- **Under performance / Low Sales Rep Performer / pausing leads:**

- Low performance reps for Residential and Small Commercial are defined as those that don't achieve a minimum of 80% of the goal defined above for CR Web RSV-APP or CR All sources RSV-WC. Low performers will be cut off from commissions for the week.
- Rules:
  - we pause new lead assignment until they become a medium performer and they are not able to earn any commissions that month unless their CR increases to the Medium Performer category
  - we put them on an underperformance meeting if it's the first month where an SDR or sales rep missed the quota or conversion rate goals to communicate the seriousness of the situation as stated in our [direct sales performance rules](#). Note the metrics that must be included in this meeting as specified in the previously mentioned wiki.
  - If the sales rep doesn't pass the underperformance meeting a PiP will take place the following month. If they meet the metrics defined in the direct sales performance rules wiki, the relationship can continue as usual.
  - Any paid vacation should be deferred until the sales rep is back to at least a medium performer

- **New sales reps / before passing sales rep trial period:**

- Month1: focused on training. sales manager can assign maybe up to 5 sales visits or so if new hire moves quickly and sales manager feels the rep is ready and able to convert those at least at a "medium performer" conversion rate
- Month2: focused on ramping using real sales visits. Sales manager can have the rep assigned up to the "medium performer" number of sales visits
- Month3: manager can only assign "medium performer" number of sales visits for this month unless the candidate achieves the "high performer" conversion standards, in which case up to the "high performer" number of sales visits can be assigned

## Channel Partners Sales: Partner Sales Managers

- Top Performer:
  - [>100% of Welcome Call quota](#)
  - [>100% of RSV-WC quota](#)
- Medium Performer:

- >70% of the Welcome call projects quota
  - > 70% of RSV-WC quota
- Low performer: less than the above:
  - no variable earned that month if a low performer

# Lead Assignment Process

## Beginning of each month:

- At the start of each month we will analyze each Sales Rep performance according to [this dashboard](#) for Residential and [this dashboard for PDBT](#) and categorize them in the correct performance bucket. Each Sales Rep will keep its category for the whole month so the SDR manager and Marketing team generate a SQL acquisition and RSV plan assignment throughout the month. There will be a biweekly check to corroborate that the top-medium performers are on track with their CR for the end of the month and also a check in case low performers have changed their status.
- The SDR manager will then distribute the leads to Sales Rep managers on a “pro-rate basis” - i.e. based on the % of total RSVs each EE “earns” (example [here](#)). The Sales Rep manager will then be responsible for distributing the lead volume according to the % of total RSVs each Sales Rep earns and Head of Direct Sales will review plans each week in weekly 1:1 with managers.
  - Help Sales Reps establish strategies to recover past projects or increase certain calendar month conversion rates.
  - Monitor Sales Reps and set deadlines for past project approvals.
  - [Run forecast models](#) to ensure Sales Reps are set up for success with the RSV volume
  - Develop strategies with the team to help them close the approval gap and achieve a higher Tier.
- During the month, the sales manager will work to identify which projects each sales rep needs to close in order to reach the “Top Performer” CR bucket based on this [Dashboard](#). This step is critical since we are considering cumulative conversion rate as a key to higher volume and our main objective is to have a healthy CR in the last three calendar months - Month0, Month1 and Month2 from RSV-WC. Key activities:
  - Top performers will also be set up for success because with a high and constant volume on the month, they will generate pipeline and over-perform with results.
  - Low and Medium performers will eventually increase their CR and aspire to higher ranks or they will “bottom out” and leave Bright.

# Lead Definitions (and how to handle them when assigning leads):

- Paid Acquisition Web Leads:
  - Definition: any leads originated by paying Facebook or Google
  - How to assign them: use guidelines above
- Organic Web Leads:
  - Definition: leads originated on our website by folks hearing about us and searching us or by our SEO efforts.

- How to assign them: use guidelines above
- "No Offer Presented" Leads:
  - Definition: Customers that had an scheduled sales visit but they didn't show up
  - How to assign them: These leads are recovered using a [special pitch](#), and can only be assigned when there are volume problems or a strategy defined by our Head of Sales. The SDR manager must always have a defined strategy to know to which Sales Reps they will be assigned (do not assign without a defined strategy per Sales Rep).
- Zombie Leads from Sales:
  - Definition: not approved customers without any registered activity in more than 120 days that had a successful sales visit (this means we manage to present them our offer)
  - How to assign them: These leads are recovered using a [special pitch](#), and can only be assigned when there are volume problems or a strategy defined by our Head of Sales. The SDR manager must always have a defined strategy to know to which Sales Reps they will be assigned (do not assign without a defined strategy per EE)
- Zombie Leads from SDR:
  - Definition: TDED leads that never had an assigned Sales Rep (they didn't confirm they roof, they didn't send their bill or never gave a date)
  - How to assign them: These leads are recovered using a [special pitch](#), and can only be assigned when there are volume problems or a strategy defined by our Head of Sales. The SDR manager must always have a defined strategy to know to which Sales Reps they will be assigned (do not assign without a defined strategy per Sales Rep).

## Q&A:

- If we stop assigning RSVs to an Sales Rep and they manage to increase CR during the same month and we decide to assign RSVs again, we may or may not be able to reach their initial RSV monthly assignation plan, depending on if we have enough time and leads to do so. Is that right?
  - Yes! Dipping below our minimum CR from RSV-WC over the last 180 days is very costly to Bright and a large problem, so should be considered as a red flag that the Sales Rep may not stay at Bright and no further RSVs should be assigned unless they can show they can get back on track
  - Note that when this occurs we also ask that the Sales Rep is put on a PiP to communicate the seriousness of the situation
- How should I track the Month1 and Month2 approval plan?
  - Each manager has to review on their 1:1 with their team members.
  - What's recommended:
    - Set clear expectations of which CR or month the Sales Rep needs to increase.
    - Define how many project that translates to
    - Help the Sales Rep set the strategy to do so
    - Set weekly goals or deadlines for specific projects to be approved
- How will this help us achieve our monthly goal?
  - At the moment we are shooting for 13% CR from RSV-WC over 90 days but we are not achieving this as a team yet.

- As a result, to achieve the kW goals we are having to depend on referrals or zombies to a higher degree than expected in order to achieve our goal, which adds stress and extra work. To eliminate this extra work, we will focus on higher conversion via a properly structured lead assignment strategy
- How will this help us increase our CR in the long run?
  - The current sales rep rankings were made with the existent data, the idea is that with this process we intentionally look to approve those missing projects, focus on training, make decisions and tackle approval stoppers
  - Current Rankings will be increased with time. We should not only focus on improving medium to low performers but also in setting that challenge to top performers to increase their current performance.
- What should we do with SDR RSVs if the SDR team generates more RSVs than needed?
  - Lower bid cap for the following week
  - Distribute based on this example / formulas where Sales Reps are assigned RSVs based on % of RSVs generated that month (vs exactly 40, 30 or 20):  
<https://docs.google.com/spreadsheets/d/1ESxISgOJTzUR7ckm4mmc10fJBMC3agSdVDqqdecnLo4/edit#gid=0>
- How can we control the Marketing Cadence, should Marketing adapt to the Sales strategy for distribution, or should sales adapt to the Marketing Cadence?
  - Marketing will target a certain number of RSVs based on how many RSVs the sales team can take based on previous three calendar month conversion rate. Then, they will assign these leads based on % each Sales Rep should get according to CR performance - example [here](#).
- How do Calendar Month Conversion Rate calculations work? And what is the expected CR expected per Month?
  - Right now we expect a 14% RSV-WC CR over 90 days in Residential and 12% RSV-WC CR over 120 days in PDBT to achieve both our monthly and quarter goals. This 14% CR is divided and defined in our one source as the following:
    - Cohort0 is defined as the % of projects approved from the RSVs of the last 30 days from assignment  
To achieve a 14% CR over last 90 days, we expect a Cohort0 CR of >8.8%.
    - Cohort1 is defined as the % of projects approved from the RSVs of the 31-60 days prior the sales visit report was submitted (i.e. let's say we are in March our CR in Cohort1 will be the % of projects approved from the RSVs assigned in the past 60 days)  
To achieve a 13% CR over the last 90 days, we expect a Cohort 1 RSV-WC CR of >4.2%.
  - Cohort0 is defined as the % of projects approved from the RSVs of the last 30 days from assignment  
To achieve a 13% CR over last 90 days, we expect a Cohort0 CR of >8.2%.
  - Cohort1 is defined as the % of projects approved from the RSVs of the 31-60 days prior the sales visit report was submitted (i.e. let's say we are in March our CR in Cohort1 will be the % of projects approved from the RSVs assigned in the past 60 days)  
To achieve a 13% CR over last 90 days, we expect a Cohort 1 RSV-WC CR of >3.9%.
  - Cohort 2 is defined as % of projects approved from the RSVs of 61-90 days ago (i.e Let's say we are in March our CR in Cohort2 will be the % of projects approved from the RSVs reported 61-90 days ago)  
To achieve a 13% CR over 90 days, we expect a Month2 RSV-WC CR of >0.91%.
  - Right now we expect a 13% RSV-WC CR over 90days in Residential and 10% RSV-WC CR over 120 days in PDBT to achieve both our monthly and quarter goals. This 13% CR is divided and defined in our one source as the following:

---

Revision #95

Created 18 October 2022 23:54:17

Updated 16 October 2024 21:09:56 by Rebeca Bórquez Vidal