

Sample Lead Information (assumes import into CRM and printed Output)

Lead Information

Company Name: *Hank's Plumbing* **Phone:** 555-555-1212 **Fax:** 555-555-1211

Contact 1: *Hank Smith* **Title 1:** *President*

Contact 2: *Jane Smith* **Title 2:** *Office Manager*

Address: *123 Main Street*

City: *Anytown* **County:** *Sweetwater* **State:** *ST* **Zip Code:** *12345*

Email: *Hank@hanksplumbing.com*

Web Address: *www.hanksplumbing.com*

4 Digit SIC Code: *1711*

4 Digit SIC Description: *Plumbing and other Services*

Primary Renewal (Used as an Identifier): *01/01/2012*

Package Renewal: *01/01/2012*

Package Carrier: *Big Company*

Work Comp Renewal: *01/01/2012*

Work Comp Carrier: *Big Company*

Auto Renewal: *01/01/2012*

Auto Carrier: *Big Company*

Benefits Anniversary: *01/01/2012*

Benefits Carrier: *Good Health*

of Locations: *2*

of Employees: *35*

of Autos: *5*

Field Layout for Lead Files

Company Name

Phone

Fax

Contact 1

Title 1

Contact 2

Title 2

Address

City

County

State

Zip Code

Email

Web Address

4 Digit SIC Code

4 Digit SIC Description

Primary Renewal (Used as an Identifier)

Package Renewal

Package Carrier

Work Comp Renewal

Work Comp Carrier

Auto Renewal

Benefits Anniversary

Benefits Carrier

of Locations

of Employees

of Autos