TROPHY CLUB
CONSULTING LLC
"DISCIPLINE TAKES NO VACATION"

Reports

Racing Snail/Frontrunner
Quotes Provided
Applications Written

ECRM
Sales/Service Listviews* DAILY

Call Reports (ABS, can automate)
Inbound Calls
Outbound Calls
Talktime In
Talktime Out

*see *Elevate - Salesforce & Prioritization* and the follow up Q&A by the same name (both dated 09/22/2022) in the **Recordings** section of your member portal.

Running / Uploading Client Focus Lists

1. ECRM > Campaigns > Agent List Creation button > Name Your List (Ex. Client Focus December 2022)
2. Under "Target Leads" > Customized List Criteria > Select Attributes > select desired criteria > Done
    a. Criteria we use: check "Existing Customer" box > click "Prodcut Details" > Policy Details Auto (or Fire, we do both one at a time) > check the "by month" box for Renewal Date > enter next month.
3. Select "Show results as Households" > Select "Phone" Approach > Apply
4. Change "View By" box to "Agent Created" > select the created list > click on hyperlinked number of leads > uncheck anyone you'd like to remove > click "Export/Print" and convert to Excel (delete ALL columns EXCEPT name & phone number)
5. Login > Import a List > select desired service > select month > browse to locate/select your Excel list (If your list already has headers (First Name, Last name, Phone Number...) select "My List Has Headers" > Enter a "List Name" and "List Description" > Continue
6. You'll see a preview of your Excel file columns. If necessary, adjust the headers to match your columns. Click Continue.
7. If any names were not accepted, please double-check them before importing (rejection reason provided) > Click Continue