

SALESFORCE & PRIORITIZATION

LIST VIEW 3 - LEADS WITH NO CONTACT

CREATE ALL OPPORTUNITY LIST VIEWS IN AGENT LIST SHARING IN ECRM, WHICH APPLIES IT TO EVERYONE ON YOUR TEAM.

ALL NEW OPPORTUNITIES WILL USE THESE FIELDS TO DISPLAY:

- OPPORTUNITY.NAME
- OPPORTUNITY MOBILE PHONE
- SUBMITTED PHONE
- PRODUCT NAME
- CREATED DATE
- TOTAL CONTACTS MADE

(WIN BACK LISTVIEW CONTAINS ONE MORE FIELD, X DATE)

Field	Operator	Values
Stage	Equals	New
Created Date	Equals	YESTERDAY,2 DAYS AGO,3 DAYS AGO,4 DAYS AGO,7 DAYS AGO,10 DAYS AGO,14 DAYS AGO,17 DAYS AGO,21 DAYS AGO,27 DAYS AGO,30 DAYS AGO,59 DAYS AGO
Last Modified Date by Sales Associate	Not Equal To	TODAY

NOTES

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HOSTED LEADS

Field	Operator	Values
Stage	Equals	Not Now Follow-Up
Last Modified Date by Sales Associate	Not Equal To	LAST 30 DAYS
Opportunity Mobile Phone	Does Not Contain	DO NOT MARKET

NOTES

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WIN-BACKS

Field	Operator	Values
Stage	Equals	Quoting
X Date	Equals	11 MONTHS AGO,12 MONTHS AGO,23 MONTHS AGO,24 MONTHS AGO,35 MONTHS AGO,36 MONTHS AGO,47 MONTHS AGO,48 MONTHS AGO,59 MONTHS AGO,60 MONTHS AGO,71 MONTHS AGO,72 MONTHS AGO,83 MONTHS AGO,84 MONTHS AGO,95 MONTHS AGO,96 MONTHS AGO
Last Modified Date By Sales Associate	Not Equal To	Last 10 Days
Relationship Type	Equals	Win-Back

NOTES

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**TROPHY CLUB
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

OLD LEADS 60+ DAYS

Field	Operator	Values
Stage	Equals	New
Created Date	Not Equal To	Last 5 Months
Last Modified Date by Sales Associate	Not Equal To	Last 150 Days
Relationship Type	Not Equal To	Win Back
Opportunity Mobile Phone	Does Not Contain	Do Not Market
Submitted Phone	Does Not Contain	Do Not Market

NOTES

LEARN MORE ABOUT TCC:



THE AGENT SUMMIT:



BASIC TRAINING:



TEAM PRECISION:

