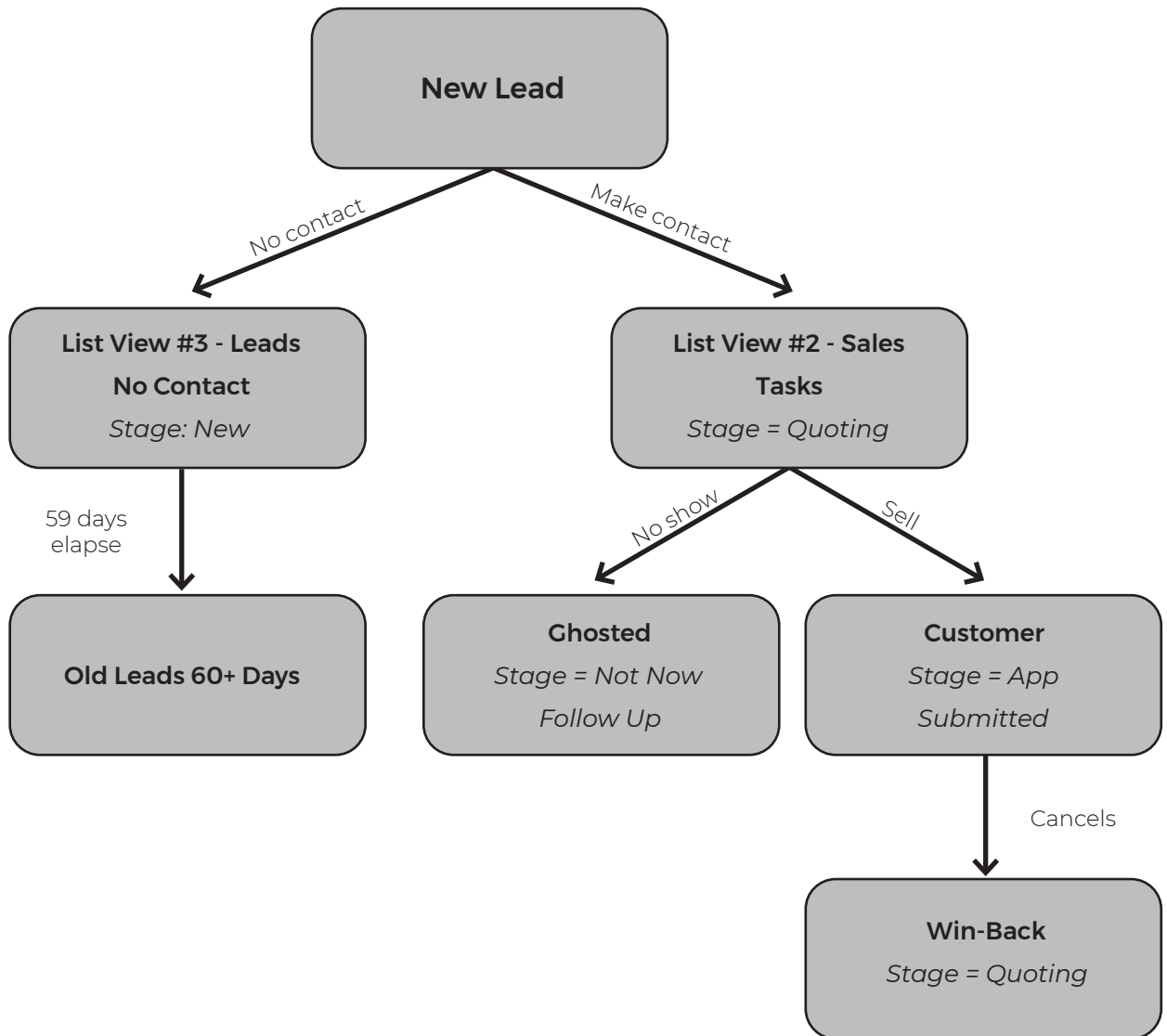


# ELEVATE WORKSHEET



## Utilizing ECRM to Write More Business

### Lifecycle of a New Lead



# ELEVATE WORKSHEET



## ***List View 1 - Service Task List***

1. Home page of Salesforce > drop down menu > Tasks
2. Create List: “Gear” icon > New > Name List “List View 1 - Service Tasks”
3. Define List: “Gear” icon > Edit List Filters > use “x” to clear all pre-populated filters and enter filters EXACTLY as outlined below > Save\*

Filters	Input
Filter by Owner	My Team’s Tasks
Closed	Equals False
Task Type	Equals Service
Due Date	Less or Equal TODAY

4. List Display: Select newly created list > “Gear” icon > Fields to Display > select visible fields as outlined below

Fields to Display
Due Date
Related to
Subject
Name
Assigned to

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# ELEVATE WORKSHEET



## ***List View 2 - Sales Task List***

1. Home page of Salesforce > drop down menu > Tasks
2. Create List: “Gear” icon > New > Name List “List View 2 - Sales Tasks”
3. Define List: “Gear” icon > Edit List Filters > use “x” to clear all pre-populated filters and enter filters EXACTLY as outlined below > Save\*

Filters	Input
Filter by Owner	My Team’s Tasks
Closed	Equals False
Task Type	Equals Sales
Due Date	Less or Equal TODAY

4. List Display: Select newly created list > “Gear” icon > Fields to Display > select visible fields as outlined below

Fields to Display
Due Date
Related to
Subject
Name
Assigned to

# ELEVATE WORKSHEET



## ***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

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:

---

---

---

---

---

---

---

---



# ELEVATE WORKSHEET



## **Win-Backs**

Fields to display:

- ❖ Opportunity Name
- ❖ Opportunity Mobile Phone
- ❖ Submitted Phone
- ❖ Product Name
- ❖ Created Date
- ❖ Total Contacts Made
- ❖ X-Date

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:

-----

-----

-----

-----

-----

# ELEVATE WORKSHEET



## ***Old Leads 60+ Days***

Fields to display:

- ❖ Opportunity Name
- ❖ Opportunity Mobile Phone
- ❖ Submitted Phone
- ❖ Product Name
- ❖ Created Date
- ❖ Total Contacts Made
- ❖ X-Date

Field	Operator	Values
Stage	Equals	New
Created Date	Not Equal To	Last 5 Months, Today
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:

-----

-----

-----

-----

-----

-----

-----

# ELEVATE WORKSHEET



## **Implementation**

### Open Sales Tasks

1. Never spoken with: *Stage = New*

Mark Task Complete

2. Ghosted or Cold Leads:

*Stage = Not Now Follow-Up*

Mark Task Complete

3. Win-Backs/Cancellations:

*Stage = Quoting*

*Enter X-Date*

Mark Task Complete

### Open Service Tasks

30 Days or newer: Work

Over 60 day or older: Mark Complete



# ELEVATE WORKSHEET



## Upcoming Classes

(All classes Eastern time)

- ❖ April 22: Quick Hit - Creating an Excellent Customer Experience
- ❖ April 29: Quick Hit - Troubleshooting List Views Q&A
- ❖ April 30: Elevate - Systems for an Efficient Office
- ❖ May 4-6: Evolve (May)
- ❖ May 6: Quick Hit - Coaches' Open Q&A
- ❖ May 7: Elevate - Total Accountability
- ❖ May 13: Quick Hit - Managing SF Connect

## Trophy Club Links



FOLLOW US  
ON FACEBOOK



FOLLOW US  
ON LINKEDIN



FOLLOW US  
ON INSTAGRAM



LEAVE US A  
GOOGLE REVIEW



TROPHY CLUB CONSULTING LLC

09