

Elevate WORKSHEET



Utilizing ECRM to Write More Business

IMPLEMENTATION

Open Sales Tasks

Never spoken with

Stage = *New*

Mark Task Complete

Ghosted or Cold Leads

Stage = *Not Now Follow Up*

Mark Task Complete

Win-Backs/Cancellations

Stage = *Quoting*

Enter X-Date

Mark Task Complete

Open Service Tasks

60 Days or newer: Work

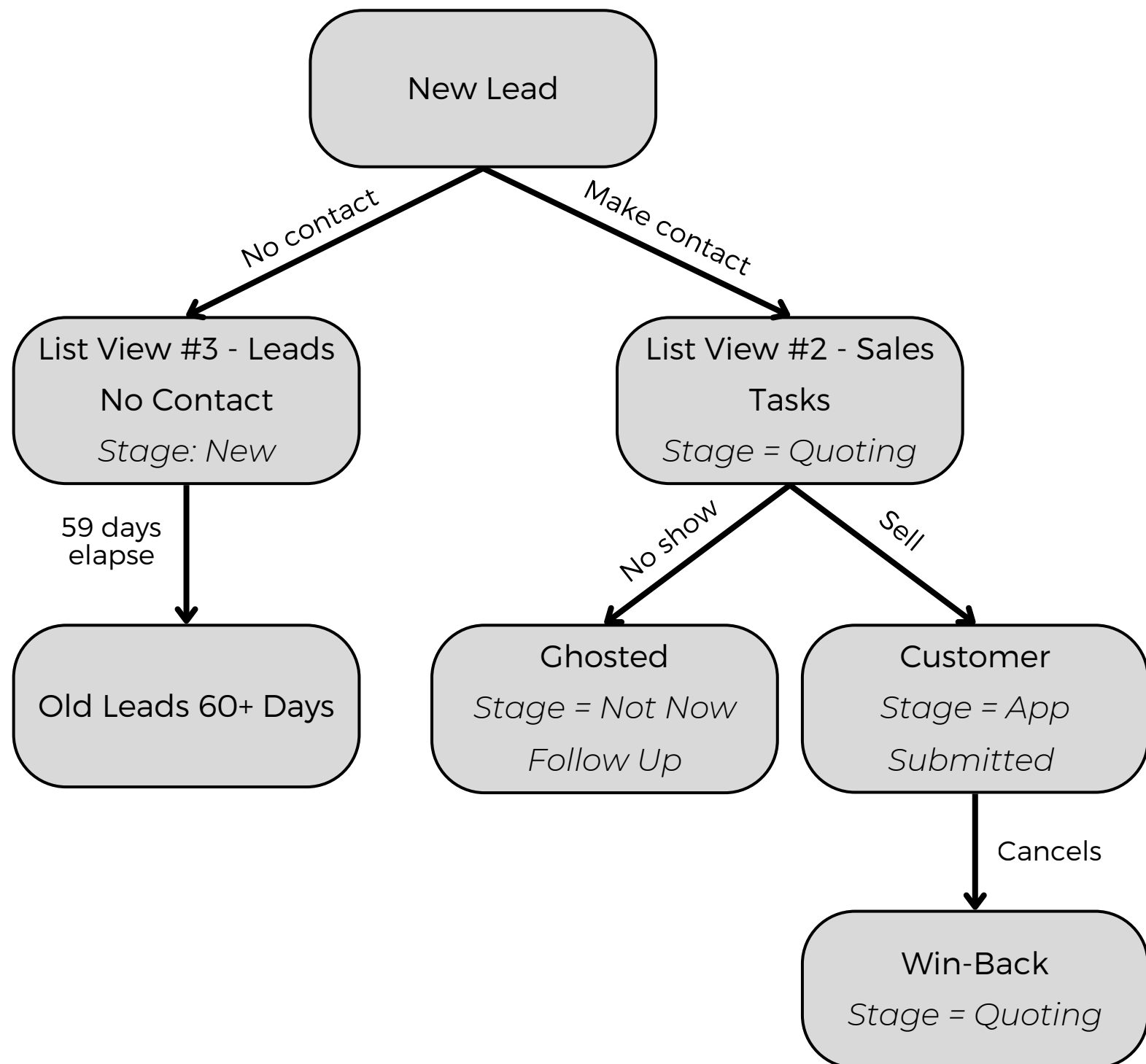
Over 60 days old: Mark Complete

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LIFE CYCLE OF A NEW LEAD



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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 (Visible Fields)
Due Date
Related to
Subject
Name
Assigned To

NOTES

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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 (Visible Fields)
Due Date
Related to
Subject
Name
Assigned To

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LIST VIEW 3 - LEADS WITH NO CONTACT

Agent must create all opportunity list views in the List View Sharing tab in ECRM, which applies it to everyone on your team. Click “New” to create the list view. Enter the List View Name, and select “Opportunity Product” as the Object.

Select Display Columns will use these fields to display. Move them to “Selected Fields” and order them using the arrow buttons.

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

Enter the following into the Field Criteria Filters:

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

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GHOSTED LEADS

Agent must create all opportunity list views in the List View Sharing tab in ECRM, which applies it to everyone on your team. Click “New” to create the list view. Enter the List View Name, and select “Opportunity Product” as the Object.

Select Display Columns will use these fields to display. Move them to “Selected Fields” and order them using the arrow buttons.

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

Enter the following into the Field Criteria Filters:

Field	Operator	Values
Stage	Equals	Not Now Follow-Up
Last Modified Date by Sales Associate	Not Equal To	Last 30 Days
Do Not Market	Equals	FALSE

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WIN-BACKS

Agent must create all opportunity list views in the List View Sharing tab in ECRM, which applies it to everyone on your team. Click “New” to create the list view. Enter the List View Name, and select “Opportunity Product” as the Object.

Fields to display:

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

Enter the following into the Field Criteria Filters:

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

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OLD LEADS 60+ DAYS

Fields to display:

- Opportunity Name
- Opportunity Mobile Phone
- Submitted Phone
- Product Name
- Created Date
- Total Contacts Made
- Last Modified Date By Sales Associate

Field	Operator	Values
Stage	Equals	New
Created Date	Less or equal	5 MONTHS AGO
Last Modified Date by Sales Associate	Not Equal To	Last 150 Days
Do Not Market	Equals	False

NOTES