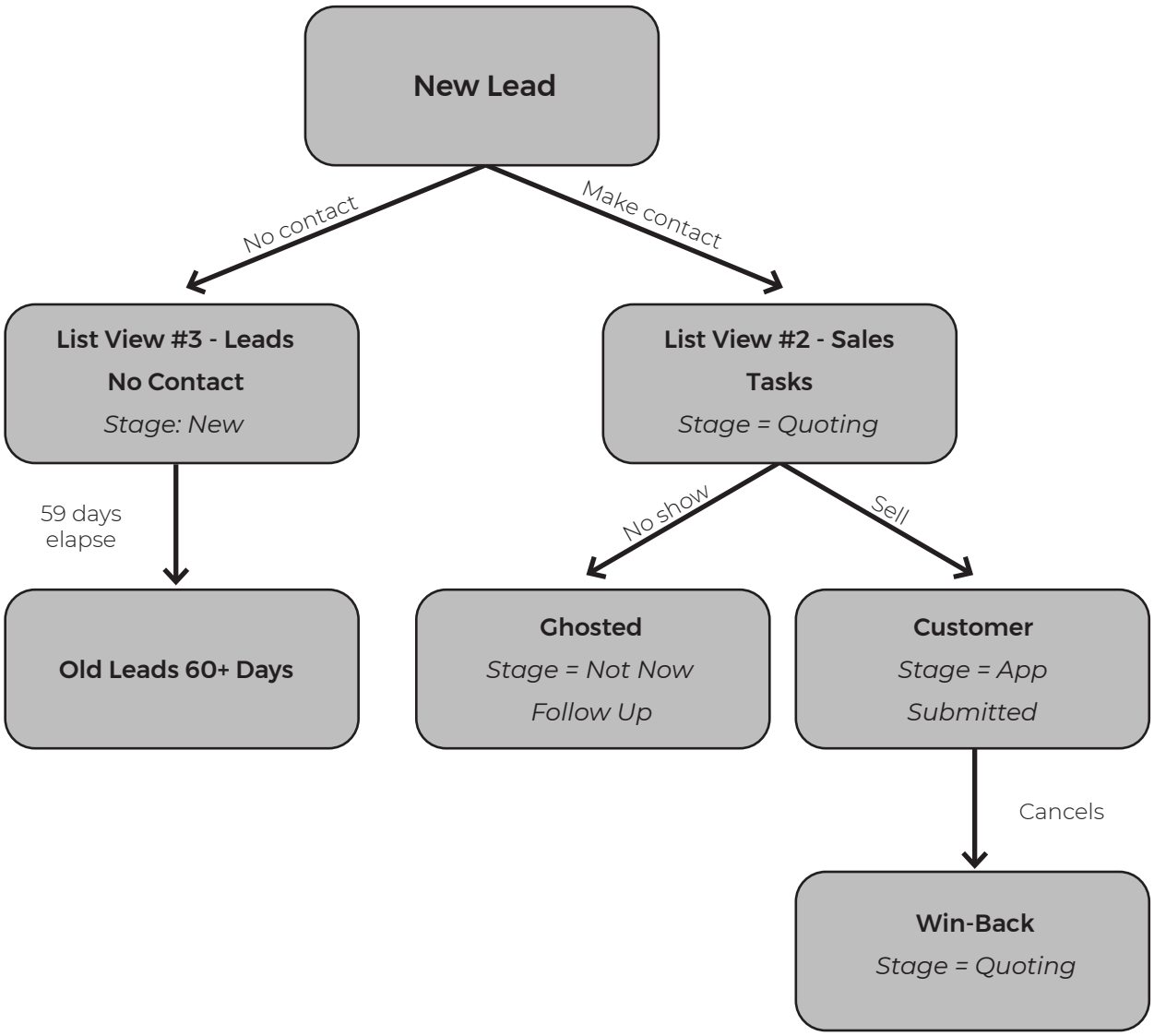
ELEVATE
WORKSHEET

Utilizing List Views to Write More Business

Lifecycle 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
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
Due Date
Related to
Subject
Name
Assigned to

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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**
- **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:

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Ghosted Leads

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**
- **Product Name**
- **Created Date**
- **Total Contacts Made**

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

Fields to display:

- **Opportunity Name**
- **Opportunity Mobile 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:

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Old Leads 60+ Days

Fields to display:

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

Field	Operator	Values
Stage	Equals	New
Created Date	Less Than	Last 5 Months
Last Modified Date	Less Than	150 Days Ago
Relationship Type	Not Equal To	Win-Back
Opportunity Mobile Phone	Does Not Contain	Do Not Market

Notes:

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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 Standard time)

- November 30-December 2 - Evolve (1:00PM-4:00PM)
- December 2 - Quick Hit (10:30AM-10:45AM)
  (Fall Life Challenge Wrap-Up)
- December 3 - Elevate (1:00PM-1:30PM)
  (2027 Team Member Handbook - AGENTS ONLY)
- December 9 - Quick Hit (10:30AM-10:45AM)
  (Control What You Can Control)
- December 10 - Elevate (1:00PM-1:30PM)
  (Utilizing TCC in 2027 & Introduction to LMS)
- December 14-15 - Evolve II Sales (12:00PM-2:00PM)

Trophy Club Links

FOLLOW US ON FACEBOOK

FOLLOW US ON LINKEDIN

FOLLOW US ON INSTAGRAM

LEAVE US A GOOGLE REVIEW