Sample Database Lists

Contacts

Status:
High-level segmentation to cast the greatest net.

- Active Client
- Inactive Client
- Prospect
- Child of Client
- Spouse of client
- Dead List
- Business
- Deceased
- Personal

Contact Category:
Used to rank contacts.

- A
- AA
- AAA
- Business Relationship
- Business Vendor
- Business Wholesaler
- Cold
- Hot
- Lost
- Pending

Source:
Identify where the bulk of your business is coming from.

- Internet lead
- Marketing list
- Radio lead
- Referral
- Seminar
- Workshop

Personal Interests:
Interests unique to one client.

- Auto Racing
- BBQ
- Classical Music
- Comic Books
- Disc Golf
- Reading
- Sailing
- Organic
- Woodworking

Keyword:
Yes or no answer to put contacts into groups.

- Brokerage client
- Direct investment client
- Fee-based client
- Hourly client
- Investment advisory client
- Life insurance client
- Retirement client
- Tax client
- 1st email sent
- 2nd email sent
- 401k
- Baseball
- Beneficiary
- Birthday card
- Christmas card
- Football
- Gold
- Golf
- IRA
- Newsletter
- RMD
- Trust Account
- Will
- Wine

User Defined Fields:
Custom fields to track relationship builder questions. Open text, yes or no, true or false and list of options available.

- Alma mater
- Cash
- Citizenship
- Coffee preference
- Cookie preference
- Drink preference
- Favorite NFL
- Favorite restaurant
- Plan renewal month
- Pet’s name
- Military service branch
- Withdrawal date

(*more* >>)

Activities and Notes Categories

Categories:

Enhance the value of your notes, activities and documents with categories to report on historic entries later.

- Account Support
- Business- Accounting
- Business- Annuities
- Business-Insurance
- Business-Real estate
- Business- Taxes
- Business- Wealth management
- Client Meeting Notes
- Client Review
- Compliance-email Review
- Customer Service
- Email Received
- Email Send
- Important conversation
- Incoming Email
- Mail Merge Sent
- Meeting Cancellation
- Outgoing Email
- Pending Item
- Phone Call- Incoming
- Phone Call- Meeting Follow-Up
- Relationship Building
- Seminar Event Notes
- Staff Meeting
- Technical Support
- Trade Request
- Underwriting Information
- Work Instructions

Activity Type:

Medium of note or activity, calendar colors applied via activity type.

- Client lunch
- Client meeting
- Client review
- Face-to-face
- Out of office
- Personal
- Seminar
- Webinar

Opportunities

Stages:

Know where you are in your sales pipeline with customizable stages.

- Gathering Contact Information
- Introduction
- Discovery
- Proposal
- Commitment
- Onboarding

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